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AUTHOR Bustos, Fabio M.
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ABSTRACT

Educational planning in Latin America is about three decades old. In the 1960s and 1970s educational systems in the region expanded dramatically. During this time countries institutionalized educational planning processes and allocated to them considerable human and financial resources. Educational management, however, did not receive sufficient recognition during this same period, nor did it mobilize resources and strategies for change and innovation. As a result of the economic crises of the 1980s, educational planning and management possessed a low capacity to cope with new problems and challenges. Today, new paradigms and new horizons are emerging in the design, methods, and application of planning, as well as a recognition, at the political, practical, and theoretical levels, of the importance of educational management as seen in the light of changes in the region. A 28-item bibliography is included. (DB)

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REGIONAL STUDY

REVIEW AND PROSPECTS OF EDUCATIONAL PLANNING AND MANAGEMENT IN LATIN AMERICA AND THE CARIBBEAN

F. BUSTOS

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MEXICO
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ASSESSMENT OF PAST ACHIEVEMENTS AND FUTURE PERSPECTIVES OF EDUCATIONAL PLANNING AND MANAGEMENT IN LATIN AMERICA AND THE CARIBBEAN

FABIO M. BUSTOS O.

COLOMBIA

TABLE OF CONTENTS

INTRODUCTION 1

1 - PRINCIPAL POLITICAL, ECONOMIC, SOCIAL AND EDUCATIONAL DEVELOPMENTS OF THE EIGHTIES 2

1.1 Economic Development 4

1.2 Social change..... 14

1.3 Trends and policies in educational development..... 18

2 - THE PROFILE OF EDUCATIONAL MANAGEMENT..... 26

2.1 The organic structure of educational systems.....27

2.2 Operational levels of educational management.....29

2.3 Other active agents in educational management.....32

2.4 Administrative dynamics of educational organizations.....33

2.5 New trends in educational management.....36

2.6 Physical and human resources for educational management.....39

3 - THE PROFILE OF EDUCATIONAL PLANNING.....41

3.1 The institutionalization of educational planning.....43

3.2 The place of planning units within organizational structures....43

3.3 Inter-sector and intra-sector coordination.....44

3.4 The operational levels of planning 45

3.5 The scope and field of educational planning.....48

3.6 Planning resources.....53

3.7 Recent Tendencies in the evolution of educational planning 54

4 - TRAINING OF EDUCATIONAL PLANNERS AND MANAGERS 58

4.1 Training needs 59

4.2 National and regional training and research programs 60

4.3 The quest for new strategies and training methods 61

5 - INTERNATIONAL COOPERATION IN THE FIELDS OF EDUCATIONAL PLANNING AND MANAGEMENT 62

5.1 Cooperation in function of greater and better circulation of information ...63

5.2 Development of regional networks run by institutions and specialists 64

5.3 Development of joint research studies in the field of educational planning and management 64

5.4 Regional and international cooperation and the role of UNESCO 65

6 - PERSPECTIVES IN EDUCATIONAL PLANNING, MANAGEMENT AND EVALUATION 66

6.1 Revaluation of the strategic role of education 67

6.2 Redefinition of the role of the State in education 68

6.3 Indivisibility of the process of design, implementation and evaluation of educational action 68

6.4 Conceptual and operational diversification in planning and management faced with different realities 69

6.5 Educational planning and management to reinforce democracy and improve educational quality 70

6.6 Possible orientations, measures and programs in educational planning and management 71

BIBLIOGRAPHY 72

INTRODUCTION

Latin America's experience in the field of Educational Planning is about three decades old. Its development and scope are commonly attributed to diverse factors, particularly to the strong pressure of social demand, motivated by the growth in population and the social, economic and even political value attributed to education.

The well-known expansion of educational systems in Latin America has been largely backed by more or less systematic regularization of the educational offer in response to the heavy and diversified social demand. The 60's and the 70's represent the era of "Education Euphoria" and the "Golden Age" of Educational Planning.

During these two decades, all countries institutionalized Educational Planning processes, allocating them considerable human and financial resources. Their determination in regard to planning found expression in official documents, in the form of "Educational Plans". Moreover, a great part of the international aid from the organizations in this sector, particularly from UNESCO and OAS, resulted in significant contributions in the form of technical and financial assistance. Educational Management, however, did not receive sufficient recognition during this same period, nor did it mobilize resources and strategies for change and innovation. In this field, efforts were more sporadic and less systematic.

The worldwide economic crisis, whose first effects were felt in Latin America at the end of the seventies, progressively affected educational systems, particularly due to a decrease in financial resources from the State, a deterioration in the quality of educational services, and a growing rift between education and the changes in society as a whole, and scientific and

technical progress (1).

With the intensification of the economic crisis in the eighties, traditional educational planning and management found themselves in a dead end situation, reflecting their low capacity to cope with new problems and new challenges. Generally speaking, educational planning, both in theory and in practice, experienced a loss of credibility and a reduction of its political importance in the decision-making process. Today, new paradigms and new horizons are emerging in the design, methods and applications of planning, as well as a recognition, at the political, practical and theoretical level, of the importance of educational management as seen in the light of political, social and economic changes in the region.

Holding the International Congress on Educational Planning and Management at the beginning of a decade that, in its turn, closes both a century and a millennium, is symbolic of the opportunities open to the area to find new bearings to revitalize the processes of developing education in Latin America, with two different approaches: on the one hand, to reduce the educational deficits that have accumulated and, on the other, to fill the gap that exists in regard to the political, socio-economic, and scientific-technological developments, to place the area in its rightful position on the international scene.

1 - PRINCIPAL POLITICAL, ECONOMIC, SOCIAL AND EDUCATIONAL DEVELOPMENTS OF THE EIGHTIES

Among other developments, the eighties witnessed the following macro-economic, social and political phenomena :

(1) Philip H. Coombs has made a thorough and detailed analysis of this phenomenon at world scale in his work The World Educational Crisis - Current Perspectives, particularly on Chapter 1, "New Aspects of an Old Crisis", Madrid, published by Santillana, 1985, p. 21-57.

- The economic crisis worsened, resulting in recession or inflation, and at times hyperinflation.

- The region's foreign debt became the main most determining and crushing factor driving the economy down.

- The social effects of the measures of economic adjustment became acentuated, namely in terms of increased unemployment, decreased household income and the deterioration - sometimes even reduction - of basic social services, further widening existing social imbalances, leading to increased social marginalization and critical poverty.

- Fighting intensified at the level of certain armed confrontations (sub-regional and national), with obvious socio-economic and political effects on the region and international relations.

- A paradox became evident between the renewed assertion of political democracy - as seen in the return to democracy of certain countries previously ruled by authoritarian governments - and a weakening of democracies that, only recently, were still strong, due particularly to their failure to obtain economic independence through economic growth together with social justice.

- It is more or less widely recognized that the quality of education has deteriorated, not only due to budget restrictions but also to the feeble energy devoted to the introduction of far-reaching innovations in the teaching-learning processes.

- The Government has gradually lost its traditional monopoly in the guidance and offer of educational services, not only consequent to economic restrictions, but because of a certain inefficiency in the management of its limited resources.

Let us now see how such trends are expressed in more specific terms.

1.1 - Economic Development

The Continental Economic Conference of 1984, held in Quito (Ecuador) under the aegis of the Economic Commission for Latin America and the Latin American Economic System, deemed the economic situation of the region during that period "the most serious economic crisis in this century", with perspectives of becoming worse and more widespread in the long term if no adequate structural policies were adopted. Five years later, the crisis became worse still - in some cases disastrous - forcing certain countries to resort to "shock treatment" at the urging of the International Monetary Fund and the World Bank. A few examples of these are the economic readjustment policies adopted by Peru, Bolivia, Nicaragua, Mexico, Argentina, Ecuador and Venezuela. In the other countries, the outlook is not brighter nor simpler, as revealed by the main indicators illustrating this situation (Table 1).

A brief glance at the behaviour of the main indicators will outline the overall pattern of the general situation in this region, especially in regard to the following aspects:

a) Economic growth.

Even though the world oil crisis (1974), with its effects on world economy, had seriously affected non-exporting countries in the region, and greatly benefitted the three big oil exporters (Mexico, Venezuela and Ecuador), Latin American economy, on average, showed acceptable growth.

The drop in oil prices and the growing deterioration of the price of other raw materials destined for export, the protectionist measures taken in industrialized countries, the decrease in investment and the growing flow of capital from the region, gradually intensified the economic crisis, whose first impact was a reduction in overall and per capita GNP.

Except for most Caribbean countries - Cuba and the Dominican Republic, among others - and Brazil, Colombia and Panama, the remainder of the region showed a decrease in overall and per capita GNP (Tables 2 and 3).

Table 1. Latin America and the Caribbean: Main Economic Indicators

	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Indices (1980 = 100)										
Basic economic indicators										
GNP at market prices	88.3	94.3	100.0	100.7	99.5	97.0	100.6	104.2	108.2	111.0
Gross Domestic Income	87.3	93.7	100.0	98.8	94.0	91.5	95.3	98.4	101.7	104.9
Population (Millions)	342	350	358	366	374	382	391	399	408	416
GNP per capita	92.5	96.5	100.0	98.5	95.0	90.6	91.9	93.1	94.5	94.9
Gross Domestic Income per capita	91.5	95.9	100.0	96.6	89.8	85.5	87.0	87.8	88.8	89.7
GROWTH RATE										
Short term economic indicators										
GNP	4.5	6.8	6.2	9.7	-1.2	-2.5	3.7	3.6	3.8	2.6
GNP per capita	2.0	4.4	3.7	-1.6	-3.4	-4.7	1.4	1.4	1.6	0.4
Gross Domestic Income per capita	1.3	4.9	4.4	-3.4	-7.0	-4.8	1.8	0.9	1.1	1.0
Urban unemployment	6.8	6.0	6.2	6.6	7.0	8.1	8.2	7.3	6.2	5.8
Consumer prices	38.9	54.0	56.0	57.5	84.6	130.8	184.8	274.7	64.5	198.3
Exchange price ratio Goods and services	-6.1	5.7	5.6	-5.1	-11.8	-2.9	5.9	-5.1	-7.4	0.9
Current value exports Goods and services	9.8	33.8	32.2	7.9	-11.1	-0.8	11.3	-4.7	-12.7	13.0
Current value imports Goods and services	16.7	26.5	33.3	9.5	-18.8	-28.0	3.9	-0.4	2.5	10.8
billions of dollars										
External sector										
Exports Goods and services	61.3	82.0	107.6	116.1	103.2	102.4	114.0	108.7	94.8	107.1
Imports Goods and services	69.8	88.2	117.6	128.7	104.7	75.3	78.2	77.8	79.8	88.1
Trade balance Goods and services	-8.5	-6.2	-10.0	-12.8	-1.5	27.0	35.8	30.8	15.1	18.7
Net profit and interest payments	10.2	13.6	17.9	27.1	38.7	34.3	36.3	35.1	31.5	30.1
Current account balance	-18.4	-19.7	-28.0	-40.3	-41.0	-7.4	0.1	-3.6	-15.4	-9.8
Net capital inflow	26.1	29.1	29.5	37.5	20.1	3.0	9.5	3.2	9.0	10.2
Payment balance	7.8	9.4	1.4	-2.8	-21.0	-4.4	9.2	-0.4	-6.3	0.4
Total foreign debt paid	152.7	185.3	228.1	286.3	329.3	352.1	369.8	376.7	389.3	413.1

Source : CEPAL based on official figures

Figures for GNP and consumer prices are for countries included in tables 2 and 11 (except Cuba). External sector figures are for the 19 countries mentioned in Latin America's Payments Balance table.

TABLE 2 : EVOLUTION OF THE GROSS NATIONAL PRODUCT FOR LATIN AMERICA AND THE CARIBBEAN

	Annual Growth Rates						Accrued variation
	1982	1983	1984	1985	1986	1987	1980-87
Latin America and the Caribbean (excluding Cuba)	-1.2	-2.5	3.7	3.6	3.8	2.6	10.9
Oil Exporting Countries	-0.6	-5.0	2.6	2.3	-0.9	1.6	5.9
Bolivia	-4.3	-6.5	-0.3	-0.1	-2.9	2.5	-10.6
Ecuador	1.2	-1.2	4.8	4.9	3.4	-7.0	9.4
Mexico	-0.6	-4.1	3.7	2.6	-3.9	1.4	7.2
Peru	0.4	-11.7	4.8	2.4	9.0	6.6	14.9
Trinidad and Tobago	0.3	-9.7	-6.6	-3.1	1.1	-2.3	-20.9
Venezuela	-1.2	-5.4	-1.4	1.3	6.9	3.0	1.5
Non oil-exporting countries (excluding Cuba)	-1.6	-0.9	4.4	4.5	6.8	3.1	14.0
Antigua and Barbuda	-1.4	6.4	6.6	6.6	8.0	8.7	45.5
Argentina	-5.8	2.6	2.3	-4.5	5.8	1.6	-5.8
Barbados	-5.2	0.4	3.6	0.9	5.6	2.2	5.3
Belize	-4.9	1.5	1.3	2.3	1.5	5.0	7.2
Brazil	0.9	-2.3	5.7	8.4	8.1	2.9	21.2
Colombia	1.1	1.9	3.8	3.8	5.9	5.5	26.6
Costa Rica	-7.2	2.7	7.9	0.8	5.3	3.8	10.3
Cuba	3.9	4.9	7.2	4.6	1.2	-3.5	39.3
Chile	-13.0	-0.5	6.1	2.5	5.4	5.5	9.7
Dominica	2.4	2.5	5.8	1.2	3.6	5.1	42.5
Salvador	-5.6	0.6	2.3	1.8	0.5	2.7	-6.7
Grenada	5.4	1.2	5.0	5.4	5.5	5.0	33.6
Guatemala	-3.3	-2.7	0.1	-0.5	0.2	2.5	-3.1
Guyana	-10.8	-10.3	2.1	1.0	0.2	0.7	-17.3
Haiti	-3.4	0.7	0.4	0.5	0.6	-0.5	-4.6
Honduras	-1.8		2.5	1.6	2.5	4.2	10.0
Jamaica	-0.2	1.2		-5.4	2.1	5.2	5.1
Nicaragua	-0.8	4.7	-1.5	-4.0	-0.6	1.8	4.4
Panama	5.0		-0.4	4.8	3.1	2.7	20.5
Paraguay	-0.7	-2.9	3.3	4.1	-0.3	4.6	17.3
St Christopher & Nieves	6.1	-1.1	8.2	4.6	4.6	5.1	37.2
St. Lucia	3.0	4.0	5.1	6.0	5.8	2.1	30.2
St. Vincent and Grenadines	5.8	5.0	5.8	4.1	2.4	2.0	37.4
Surinam	-4.0	-3.4	-1.9	0.9	0.1	-7.0	-8.3
Dominican Republic	1.3	5.1	1.8	-3.9	2.5	7.6	19.2
Uruguay	-10.0	-5.9	-1.2	0.2	7.1	5.4	-4.4

Source : CEPAL official data. Preliminary estimates subject to revision.
Refers to the concept of global social product.

TABLE 3 : EVOLUTION OF THE GROSS NATIONAL PRODUCT PER CAPITA FOR LATIN AMERICA AND THE CARIBBEAN

	Annual Growth Rates						Accrued variation
	1982	1983	1984	1985	1986	1987	1980-87
Latin America and the Caribbean (excluding Cuba)	-3.4	-4.7	1.4	1.4	1.6	0.4	-5.0
Oil Exporting Countries	-3.1	-7.4	0.1	-0.2	-3.2	-0.8	-11.0
Bolivia	-6.8	-8.9	-2.9	-2.8	-5.5	-0.3	-26.0
Ecuador	-1.7	-4.0	1.9	1.9	0.6	-9.6	-10.5
Mexico	-3.0	-6.4	1.2	0.3	-6.1	-0.8	-9.1
Peru	-2.2	-14.0	2.1	-0.2	6.2	3.9	-4.1
Trinidad and Tobago	-0.5	-10.6	-7.6	-4.2	-2.1	-3.5	-26.1
Venezuela	-4.0	-8.0	-4.1	-1.4	4.0	0.3	-16.5
Non oil-exporting countries (excluding Cuba)	-3.7	-2.9	2.3	2.3	4.6	1.1	-1.4
Antigua and Barbuda	-2.7	5.0	5.3	6.6	6.7	7.4	33.1
Argentina	-7.1	1.1	0.8	5.7	4.4	0.3	-14.6
Barbados	-5.9	-0.8	2.8	0.1	4.9	1.1	-0.9
Belize	-6.8	0.2	-0.7	1.6	-0.4	3.1	-5.2
Brazil	-1.3	-4.5	3.4	6.1	5.9	0.8	3.9
Colombia	-1.1	-0.2	1.6	1.6	3.7	3.3	9.1
Costa Rica	-9.9	-0.2	4.8	2.0	2.5	1.0	-9.7
Cuba	3.3	4.3	6.6	3.8	0.3	-4.4	31.7
Chile	-14.5	-2.2	4.3	0.8	3.6	3.7	-2.4
Dominica	1.1	1.2	4.5	-0.1	2.3	3.8	30.0
Salvador	-6.5	-0.2	1.4	0.5	-1.1	0.9	-14.4
Grenada	4.4	0.3	3.2	4.4	3.7	4.1	23.2
Guatemala	-6.0	-5.4	-2.7	-3.3	-2.6	0.4	-20.5
Guyana	-12.6	-12.0	0.2	-0.9	-1.6	-1.0	-27.6
Haiti	-5.1	-1.1	-1.3	-1.3	-1.2	-2.0	-16.0
Honduras	-5.3	-3.6	-1.1	-1.9	-0.8	0.9	-13.9
Jamaica	-1.5	-0.2	-1.4	-6.4	-0.6	3.7	-4.6
Nicaragua	-4.0	1.2	-4.8	-7.2	-3.9	-1.6	-17.4
Panama	2.7	-2.2	-2.5	2.6	1.0	0.6	3.6
Paraguay	-3.9	-6.0	0.1	0.9	-3.2	1.5	-5.9
St Christopher & Nieves	6.1	-1.1	5.8	4.6	4.6	5.1	34.2
St. Lucia	2.2	2.4	4.0	4.3	4.2	1.3	19.3
St. Vincent and Grenadines	4.8	4.0	4.8	3.1	1.4	1.1	28.4
Surinam	-4.0	-3.4	-2.2	0.6	-0.5	-7.5	-9.6
Dominican Republic	-1.1	2.6	-0.6	-6.1	0.2	5.1	1.1
Uruguay	-10.6	-6.6	-2.0	-0.5	6.3	4.6	-9.0

Source : CEPAL official data. Preliminary estimates subject to revision.
Refers to the concept of global social product.

b) Unemployment

Information is quite limited, but available data on unemployment in the main cities of some of the Latin American countries show a trend towards a slight downward trend during this period (Table 4). In rural areas, the problem is more acute.

c) Inflation

One of the general characteristics of the region's economic crisis is the inflationary trend, especially in larger countries, which at times reaches 3 or 4 digits. The inflationary processes reflect different situations in each country, calling for different explanations, but, generally speaking, they express the effects of surging internal demand induced by the growing tax deficit, increased monetary supply, less-than-coherent policies on price controls and wage increases, a peaking of artificial subsidies and high interest rates.

d) The foreign sector

The following fundamental aspects of Latin American economy are to be underlined :

- Volume and value of exports and imports. A general decrease in Latin American exports can be observed, with a drop in growth rate from 44.1% to 13.7% in value, and from 8.1% to 6.3% in volume, between 1973 and 1987.

For the same period, imports fell from 37.8% to 6.8% in value and from 13.2% to 6.2% in volume.

- The value of the area's main export products. Even though, in relation to average prices in the seventies, prices for the main export products progressed in the period between 1984 and 1987, the general situation is highly distressing, as the price of oil and of all animal, mineral and agricultural products strongly decreased, whereas the price of manufactured products increased.

TABLE 4 : LATIN AMERICA : URBAN UNENMPLOYMENT
(Average annual rates)

	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Latin America	6.8	6.0	6.2	6.6	7.0	8.1	8.2	7.3	6.2	5.8
Argentina	3.3	2.5	2.6	4.7	5.3	4.6	4.6	6.1	5.2	5.9
Bolivia	---	---	5.8	9.7	10.5	14.2	15.1	18.0	20.0	20.0
Brazil	6.8	6.4	6.3	7.9	6.3	6.7	7.1	5.3	3.6	3.7
Colombia	9.0	8.9	9.7	8.2	9.3	11.8	13.5	14.1	13.8	11.7
Costa Rica	5.8	5.3	6.0	9.1	9.9	8.6	6.6	6.8	6.7	5.6
Chile	14.0	13.6	11.8	11.1	22.1	22.2	19.3	16.3	13.5	12.3
Ecuador	---	5.4	5.7	6.0	6.3	6.7	10.6	10.4	12.0	14.0
Guatemala	---	---	2.2	2.7	4.7	7.6	9.7	12.9	14.2	12.6
Honduras	---	---	8.8	9.0	9.2	9.5	10.7	11.7	12.0	13.3
Mexico	6.9	5.7	4.5	4.2	4.2	6.6	5.7	4.4	4.3	3.9
Panama	9.6	11.6	9.9	11.8	10.1	11.7	12.4	15.6	12.2	14.0
Paraguay	4.1	5.9	4.1	2.2	5.6	8.4	7.4	5.2	6.1	5.6
Peru	10.4	11.2	10.9	10.4	10.6	9.2	10.9	11.8	8.2	---
Uruguay	10.1	8.3	7.4	6.7	11.9	15.5	14.0	13.1	10.7	9.3
Venezuela	5.1	5.8	6.6	6.8	7.8	10.5	14.3	14.3	12.1	0.9

- The net capital inflow and transfer of resources : for the last two decades, the region shows two contradictory trends: while Latin America was a perfect example of an area with capital inflow during the seventies, it became the main exporter of capital in the eighties (Fig. 1).

Although the developments since the beginning of this period may be explained by the drop in volume and price of their exports, the decrease in foreign investment and a drastic cut in foreign loans, the situation has become dramatic due to the outflow of national capital and particularly due to the burden of foreign debt.

- The economic stranglehold of the foreign debt on Latin America is perhaps, in this decade, the most significant economic reality for the region, and the single most important factor of its economic crisis (2).
Certain present estimates place the region's foreign debt at 419 billion US dollars (392 billion 480 million alone are owed by the four countries most heavily in debt: Brazil, Mexico, Argentina and Venezuela) (Table 5). Compared to GNP, this debt represents:

- 69.4% in Argentina
- 35.3% in Brazil
- 57.4% in Mexico
- 129.4% in Bolivia
- 103.7% in Chile
- 117% in Costa Rica

The relationship between debt and export amounts shows that, to repay their debt, certain countries would need to invest their full net income from exports for several years to come (7 for Bolivia, 5 for Argentina and Peru, 4 in the case of Mexico and Brazil, 3 for Ecuador and no less than 2 years in the case of all other countries).

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(2) The information contained in this section, and certain analyses, can be found in Revista UNO, No.9, La trampa de la deuda, Madrid, June 1989, p. 10-15, and the CEPAL document Evolution of the problem of foreign debt in Latin America and the Caribbean. Studies and Reports N° 72, Santiago de Chile, 1988.

Figure 1

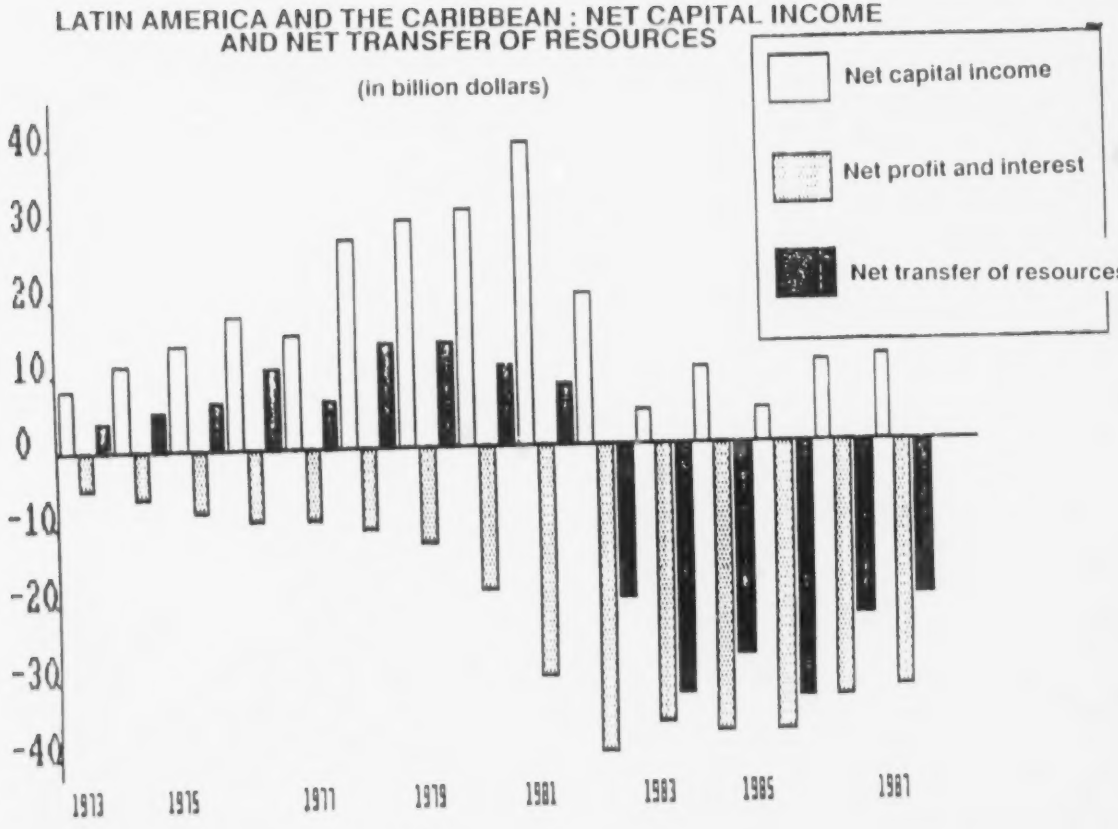
LATIN AMERICA AND THE CARIBBEAN : NET CAPITAL INCOME AND NET TRANSFER OF RESOURCES
(in billion dollars)
Net capital income
Net profit and interest
Net transfer of resources
40
30
20
10
0
-10
-20
-30
-40
1973
1975
1977
1979
1981
1983
1985
1987

TABLE 5. LATIN AMERICA: TOTAL PAID EXTERNAL DEBT

	Year end balance in US $ millions						Annual growth rate				
	1982	1983	1984	1985	1986	1987	1979 1981	1982 1983	1984 1985	1986	1987
Latin America	329,341	353,183	369,848	376,667	389,336	413,053	23.3	11.0	3.4	3.4	6.1
Oil exporting countries	143,201	152,626	156,589	156,406	158,873	167,185	25.5	9.5	1.2	1.6	5.2
Bolivia	2,889	3,265	3,272	3,287	3,636	4,279	15.8	7.7	0.3	10.6	17.7
Ecuador	6,186	6,908	7,198	7,772	8,624	9,613	25.5	8.5	6.1	11.0	11.5
Mexico	87,600	93,800	96,700	97,800	100,500	105,600	30.8	12.0	2.1	2.8	5.1
Peru	11,465	12,445	13,338	13,721	14,477	15,441	1.0	14.0	5.0	5.5	6.7
Venezuela	33,061	36,208	36,081	33,826	31,636	32,252	27.5	4.1	-3.3	-6.5	1.9
Non oil-exporting countries	186,140	199,557	213,259	220,261	230,463	245,868	21.7	12.1	5.1	4.6	6.7
Argentina	43,634	45,069	46,903	48,312	51,400	54,700	42.1	12.8	3.5	6.4	6.4
Brazil	91,576	98,175	105,275	106,731	111,045	121,264	14.4	10.8	4.3	4.0	9.2
Colombia	10,269	11,458	12,350	14,063	14,987	15,651	28.0	16.1	10.8	6.6	4.4
Costa Rica	3,188	3,532	3,752	3,742	3,791	3,914	13.3	14.7	3.0	1.3	3.2
Chile	17,159	18,037	19,659	20,403	20,716	20,551	30.7	7.6	6.4	1.5	0.8
El Salvador	1,710	1,890	1,949	1,980	1,928	1,876	19.1	8.4	2.4	-2.6	-2.7
Guatemala	1,841	2,149	2,505	2,605	2,668	2,718	19.3	24.8	12.1	-1.0	1.9
Haiti	410	551	607	600	697	741	21.1	22.3	4.5	16.2	6.3
Honduras	1,986	2,162	2,392	2,794	3,018	3,101	17.8	17.0	13.7	8.0	2.8
Nicaragua	3,139	3,788	4,362	4,936	5,760	6,270	27.4	21.5	14.2	16.7	8.9
Panama	2,820	3,392	3,644	3,642	3,835	3,731	7.5	20.6	3.7	5.3	-2.7
Paraguay	1,204	1,469	1,654	1,773	1,855	2,043	12.4	24.4	9.9	4.6	10.1
Dpm. Republic	2,966	3,313	3,536	3,690	3,525	3,420	24.4	14.0	5.5	-4.5	-3.0
Uruguay	4,238	4,572	4,671	4,900	5,238	5,888	36.1	22.0	3.5	6.9	12.2

Source : CEPAL based on official figures.
This table includes the debt with the International Monetary Fund (IMF) Preliminary figures Public Debt Total Debt, according to official figures and international financial agencies. Total debt according to World Bank. Part, if not all the reduction in mid- and long term debt is due to the fact that the authorities decided to record late payments as a decrease of the mid- and long term debt and, in counterpart, they recorded a decrease in net reserve.

It is estimated that, over the last three years, Latin America has paid, alone in interest on the amount due, US$ 25 billion per year; in 1987 that meant for some countries:

72.9% for Nicaragua	33.1% for Brazil
53.2% for Argentina	29.5% for Mexico
44.8% for Bolivia	26.3% for Chile
32.8% for Ecuador	25.3% for Venezuela

The outflow of capital due to the decline of foreign trade, the imbalance of trade exchanges and particularly the burden of foreign debt has become more serious during the last two decades due to the exodus of capital. Certain international banking sources estimate that between 1967 and 1977 alone, the four biggest debtors in the area exported 219 billion dollars. For 1988, it is estimated that the assets held in banks in developed countries by individuals or corporations from these 4 countries amounted to 300 billion US dollars.

Currently, several basic implications have been clearly recognized: a) the debt has seriously affected the area's economic development, with major impact on the most underprivileged social sectors; b) the debt cannot be repaid in its present form, but total suspension of payment could result in enormous destabilization of the international financial system.

This problem of debt is beginning to be considered not only as a problem for the indebted countries and a number of banks, but also as a political issue requiring a political solution at international level.

An additional worrisome factor related to this regions's economic development is the lack of interest and concern manifested by the developed countries. Latin America has ceased to be a promising area for investment, a good supplier of raw materials, or an interesting market for international trade.

1.2 - Social change

One determining feature of the region's development has been the social imbalance or disturbance. It is said that "since America was discovered five centuries ago, Latin Americans have not been able to find a solution to the fundamental cause for regional instability: poverty. All miracle cures, from oil to the substitution of imports, have failed." (3)

Social analyses generally recognize the existence of, on the one hand, a rigid class structure, and on the other, socially unequal economic growth. In spite of the social policies that were applied in the last two decades in view of reducing such imbalances, the economic crisis seems to have had a greater impact on weaker social sectors, further emphasizing the conditions of critical poverty in these groups.

The stagnation, and particularly the reduction in income, coupled with high unemployment, underuse of manpower and inflation (as indicated above), have undoubtedly darkened the social panorama in the region even more.

Although other social indicators recorded some progress over the last decades, they still show signs of lag, in particular when it is taken into account that they affect more than one third of the population (Table 6).

If economic development continues to stagnate, if population growth remains high, if unemployment and underuse of manpower persist, if wages keeps deteriorating, if inflation continues spiralling upward, the short-term forecast is not optimistic. Is social development in this region still only utopian? (4).

(3) The Collapse of Latin America. Special report translated from Business Week and published in SDMMA Internacional. Cali, Colombia. September 1989.

(4) Costa-Filho, A. Social Progress in Latin America : Utopia for the coming decade. ILPES, Santiago de Chile, June 1988.

TABLE 6. SOME SOCIAL INDICATORS

	Population under absolute poverty level % 1977 - 1986		Population having access to health services 1980 - 1987 %		Finished schooling 1980 - 1986 %
	Urban	Rural	Urban	Rural	
Argentina	-	-	80	21	66
Bolivia	-	85	90	36	30
Brazil	-	-	-	-	20
Colombia	32	-	60*	-	37
Costa Rica	-	-	100	63	75
Chile	-	-	-	-	-
Cuba	-	-	-	-	86
Ecuador	27	-	90	30	50
El Salvador	40	65	80	40	68
Honduras	20	32	85	65	27
Guatemala	14	55	47	25	36
Mexico	-	-	-	-	66
Nicaragua	21	19	45*	60	27
Paraguay	19	50	100	38	48
Peru	49	-	90	17	51
Panama	21	10	-	64	73
Uruguay	22	-	95	80*	88
Venezuela	-	-	-	-	68
Dom. Republic	45	43	80*		88

Sources : UNICEF and World Bank : State of World Childhood (L989)

* Total (Urban and Rural)

Certain factors that reflect this situation are :

a) Social inequality

The weekly publication The Economist recently stated that "Income distribution in Latin America shows the greatest inequalities in the world, especially when compared to Southeast Asia. In Brazil, for example, where the poorest 1/5 of the population receives barely 29% of the total income, the richest 1/5 receives 67%, or 33 times more. In Thailand, on the other hand, where the poorest 1/5 receives 9%, the richest 1/5 receives only four times more (ie. 37%). On average, 20% of the richest population in Latin America is 21 times richer than 20% of the poorest, while in Southeast Asia that proportion is only nine".

The same publication quotes a study from the Harvard University economist Jeffrey Sachs who, relating income distribution to economic behaviour, found that almost all developing countries with middle-high incomes but greater inequalities had had to renegotiate their debt during the eighties. (5)

b) Deterioration of wage income

An important aspect of social development, witnessed during the present decade, is the progressive erosion of wage income (Table 7). This phenomenon is related to the above-mentioned decrease in per capita GNP and high inflation rates.

In summary, the optimism and considerable development experienced in education - and consequently in the sector's planning - during the sixties and seventies, were followed, in the eighties, by adjustment measures resulting from the profound economic crisis that was affecting the area. The effects of these have been twofold: a) direct impact on State budgets for education, with negative effects on teachers' salaries and on investment and spending for teaching materials;

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(5) Fracaso económico sin paralelo, The Economist, translated for SUMA Internacional, Cali, Colombia, Sept. 1989, p.48.

TABLE 7. WORK INCOME BY SEGMENTS A/ (INDEX : 1980 = 100) AND GROWTH RATE

	1980	1981	1982	1983	1984	1985	1986	1987	Mean Annual Rate	Cumulated Change 1980-1987
Changes in average wages and salaries										
Agricultural employment	100	100.5	93.6	88.8	87.1	78.5	93.8	77.2	-3.6	-22.8
SFP employment, large enterprises	100	98.4	99.8	90.4	90.1	93.4	95.5	85.1	-2.3	-14.9
SFP employment, small enterprises	100	98.8	96.5	87.0	82.1	84.1	82.1	69.1	-5.1	-30.9
Public employment	100	92.7	90.2	80.7	76.4	79.3	76.0	68.0	-5.4	-32
Informal employement	100	88.1	80.6	71.5	68.0	67.1	68.1	58.9	-7.3	-41.1
Total employment	100	94.8	91.6	81.8	79.2	79.9	82.6	72.1	-4.6	-27.9

Sources: PRELAC, evolution of the labor market between 1980 and 1987, working paper 328, Santiago de Chile, 1988. P. 37.
A/ Includes Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico and Venezuela.

b) impact on the socio-economic conditions of the poorest social sectors, with repercussions on school enrolment and above all on steady and permanent school attendance, resulting in a high dropout rate and a considerable number of repeaters, especially during the first years of basic or elementary school.

1.3 Trends and policies in educational development

The sixties and seventies were characterized by an enormous quantitative expansion of educational systems in terms of enrolment, teaching personnel, schools, and education budgets. This expansion, attributed to various factors such as demographic, economic, or urbanizational changes in social demands and in the social value placed on education, essentially benefitted the middle classes, who found here an open door towards a certain degree of modernization in society. During this period, planning played a major role in organizing this process of expansion. As can be expected, due both to the educational system's internal dynamics and to external forces, the proportion of growth rose higher and greater in the middle and upper levels of education (6).

This necessarily had several implications, whose main effects were the following : a decrease in quality as a result of the mass phenomenon, and an increase in educational costs due to the diversification in educational demand, particularly at the secondary and higher educational levels.

These phenomena were perceived with growing intensity as of the mid-seventies, when the effects of the worldwide economic crisis began to amplify in certain countries, particularly in those not exporting oil. Similarly, certain

(6) A full analysis of the development of educational systems in Latin America and the Caribbean was done by the project Educación y desarrollo educativo en América Latina, sponsored by CEPAL, UNESCO and PNUD, a summary of which in two volumes was published by Editorial Kapelusz (Buenos Aires, October 1987), coordinated by Germán W. Rama.

countries began to feel the political effects, in the limitation of democratic tendencies, particularly in those, like the Southern Cone countries, with totalitarian regimes, where one evident policy was the reduction of State budgets for education, especially higher education. These countries also saw the emigration, for political reasons, of great numbers of their teachers, their technical experts and researchers in education.

The present decade, characterized by the above-mentioned intensification of the economic crisis, is witnessing a slackening in the pace of development of educational systems - partially explained by demographic considerations, but primarily by socio-economic factors - a decrease in State participation in educational financing and offer, growing importance attributed to the quality of education and likewise to innovation in both form and content, and value enhancement of extra-scholastic forms of education.

The development of educational systems in Latin America in this decade, in terms of both policy and implementation, shows the following characteristics:

- More or less considerable reduction of the illiteracy rate, principally due to the expansion of basic education in the preceding years (Table 8);

- A continuing pace of expansion and diversification, particularly for secondary and advanced levels, with primary schooling showing a slightly slower pace than in the previous two decades (Table 9);

- The presence and significance of several forms of education such as non-formal education, adult education, basic and special education, as the responsibility of the State and with greater participation of the private sector;

- The recognition and incorporation of pre-school education as a part of the educational system in most countries in this region, whose attendance rate rose from 7.9% in 1980 to 13% in 1986, or, in absolute figures, from 4,750,000 in the base year to 8,619,000 in 1986.

TABLE 8. LATIN AMERICA AND THE CARIBBEAN ILLITERACY ESTIMATES IN 1980, 1985,1987 (25 COUNTRIES IN THE REGION)

COUNTRY	1980		1985		1987 (B)		Increase 1985-87
	Number Of Illiterates (ailes)	Illiteracy Rates (%)	Number of Illiterates (ailes)	Illiteracy Rates (%)	Number of Illiterates (ailes)	Illiteracy Rates (%)	
Argentina	1185	6.1	934	4.5	-	-	-
Bolivia	993 a)	36.8	925	35.8	1318	33.5	393
Brazil	18717	26	17284 A)	22.2 B	17321 j)	19.6 C)	37
Colombia	2407	14.8	2259 B)	12.7	-	-	-
Costa Rica	-	-	103	7.4	125	7.3 C)	22
Cuba	106 b)e)	2.2	-	-	-	-	-
Chile	681 c)	8.9	-	-	507	5.9	-
Ecuador A)	760	16.2	660	17.6	824	14.2	164
El Salvador	818	32.7	820	32.4	-	-	-
Guatemala	-	-	2519	45	-	-	-
Guyana	-	-	25	4.1	-	-	-
Haiti	2423 d)A)	78.5	2436	77	2437 B)	75	1
Honduras	594 f)	43.1	940	40.5	1380 j)	54.3 C)	440
Mexico A)	6435	16.8	4633	10.1	3054	6.1	(1,579)
Nicaragua	186 i)	13	-	-	-	-	-
Panama	157	14.4	157	11.8	174	12	17
Paraguay	219 c)	12.5	253	11.8	-	-	-
Peru A)	1737 h)	17.4	1800	15.2	1536 j)k)	12.7 C)	(264)
Dom. Republic	1519 b)g)	31.4	893	22.7	989 k)	24.1	96
San Cristobal and Nieves	-	-	-	-	3	11.7	-
Surinam	-	-	23	10	33 k)	16.8	10
Trinidad & Tobago	35	5.1	35	3.9	-	-	-
Uruguay	125 h)	6.1	101	4.5	-	-	-
Venezuela	1319 b)	15.3	1416	13.1	1171 k)	10.5 C)	(245)

Sources: - UNESCO. Quantitative evolution of educational systems in Latin America and the Caribbean. Statistic analysis. ED-87/mindelac/ref.2.

- UNESCO. Statistical yearbook 1987.

- UNESCO. Alfabetización 1983.

A) Main Project Progress National Reports - 1986.

B) Answers to SIRI questionnaire, 1988.

C) The CELADE population was taken into account due to absence of data.

a) 1976; b) 1981; c)1982; d) 1983; e) 15-49 year old population; f) 1974; g) Population over 5 years;

h) 1975; i) Population of 10 years or over (not including 130,372 persons classified as inept illiterates" (Note from t source); j) 1986; k) Only total illiterates are taken into account.

Table 8 continued

Brazil: the source does not specify if functional illiterates are included.
Colombia: corresponds to 1985.The source does not specify if functional illiterates are included.
Chile: the source indicates the following calculation methodology: illiterates were considered, according to the 1982 year by year, until 1987 the number of illiterates and percentage ofdeaths was substracted from this figure and the num lack-of-use illiterates
Ecuador: the source does not specify if the number of illiterates includes functional ones. The figure for illiteracy coincides with that of population without schooling.
El Salvador: this figure refers to population and absolute illiterates of 13 or more years of age.
Haiti: SOURCE: EVOLUTION DU FINANCEMENT ET DE L'ADMINISTRATION DU SECTEUR DE L'EDUCATION EN HAITI.1980-1987.
Document prepared by Marie Denise JEAN, by request of CRESLEC-UNESCO, Port Au Prince.

Oct. 1988. On the other hand, in document "NATIONAL PARTICIPATION PLAN, MAJOR EDUCATIONAL PROJECT"
PORT AU PRINCE, NOV. 1988, the figures for 1986 are as follows:

Population 15 years or over 3,345.786
Illiterate population 15 years or over 1,908.987
Illiteracy rates ..... 57.1 %

Enrolment by geopgraphic area, by administrative office
1985 and 1987

Country	1985	1987											
		Total			URBAN				Rural			
					Urban enrolment as % of total				Urban enrolment as % of total			
	Total	Total	Total. Privé.	% Privé	Total.	Privé.	% Privé.	Inscription urbaine en % du total.	Total.	Privé.	% Privé.	Inscription urbaine en % du total
Antigua and Barbude	-	7,688 b)	2,279	29.6	5,372	2,133	39.7	69.9	2,316	146	6.3	30.1
Dutch West Indies	-	-	-	-	-	-	-	-	-	-	-	-
Argentina	4,589,291	4,906,907	927,217	18.9	-	-	-	-	-	-	-	-
Aruba	-	6,058	5,375	88.7	-	-	-	-	-	-	-	-
Bahamas	32,848	-	-	-	-	-	-	-	-	-	-	-
Barbados #	30,161	30,237 0	-	-	-	-	-	-	-	-	-	-
Belize	39,212	-	-	-	-	-	-	-	-	-	-	-
Bolivia	1,180,000	1,369,664	104,122	7.6	898,976	104,122	11.6	65.6	470,688	-	-	34.4
Brazil	24,769,359	25,607,893 c)	3,144,734	12.3	19,789,213	3,008,570	15.2	77.3	5,818,680	136,164	2.3	22.7
Colombia	4,039,533	4,119,015	533,911	13.0	2,635,008	505,855	19.2	64.0	1,484,007	28,056	1.9	36.0
Costa Rica #	362,877	393,305 c)0	20,032	5.1	184,948	18,077	9.8	47.0	208,357	1,955	0.9	53.0
Cuba	1,174,400	936,914	-	-	654,609	-	-	69.9	282,305	-	-	30.1
Chile	2,062,344	2,007,503	708,096	35.3	1,631,922	651,038	39.9	81.3	375,581	57,058	15.2	18.7
Dominique #	12,340	12,205 0	-	-	-	-	-	-	-	-	-	-
Equator	1,672,000	1,785,426	296,724	16.6	920,231	244,957	26.6	51.5	865,195	51,767	6.0	48.5
El Salvador	915,219	837,520	92,341	11.0	456,468	85,827	18.8	54.5	381,052	6,514	1.7	45.5
Grenada	19,939	-	-	-	-	-	-	-	-	-	-	-
Guatemala	1,021,800	1,097,851	154,248	14.0	484,365	115,306	23.8	44.1	613,486	38,942	6.3	55.9
Guyane	121,869	112,581	-	-	-	-	-	-	-	-	-	-
Haiti	872,500	929,000 c)	540,100	58.1	503,000	-	-	54.1	426,000	-	-	45.9
Honduras	770,201	810,412	42,968	5.3	305,824	28,450	9.3	37.7	504,588	14,518	2.9	62.3
British Virgin Islands	2,060	-	-	-	-	-	-	-	-	-	-	-
Jamaica	341,748	346,412	12,700	3.7	-	-	-	-	-	-	-	-
Mexico	15,124,160	14,768,008	806,987	5.5	9,322,959	788,891	8.5	63.1	5,445,049	18,096	0.3	36.9
Montserrat	-	-	-	-	-	-	-	-	-	-	-	-
Nicaragua	576,580	538,725	75,769	13.0	349,086	67,634	19.4	59.8	234,639	8,135	3.5	40.2
Panama	340,135	343,616	27,031	7.9	156,496	26,774	17.1	45.5	187,120	257	0.1	54.5
Paraguay	570,775	579,687 c)0	-	-	-	-	-	-	-	-	-	-
Peru (A)	3,762,900	3,599,316 c)	436,261	12.1	-	-	-	-	-	-	-	-
Dominican Republic#	1,098,900	1,055,491 c)	-	-	-	-	-	-	-	-	-	-
Saint Christopher #	7,655	6,562 0	-	-	-	-	-	-	-	-	-	-
Saint Vincent and the Grenadines	24,561	-	-	-	-	-	-	-	-	-	-	-
Sainte Lucie	32,817	32,798 c)0	-	-	-	-	-	-	-	-	-	-
Surinam #	71,454	59,633 0	-	-	-	-	-	-	-	-	-	-
Trinity and Tobago #	168,308	166,671 0	-	-	-	-	-	-	-	-	-	-
Uruguay	356,002	354,883 c)0	-	-	-	-	-	-	-	-	-	-
	2,772,641	2,880,333 c)	336,568	11.7	2,184,374	325,294	14.9	75.8	695,959	11,274	1.6	24.2

- The launching and greater momentum in almost all countries of the regionalization and decentralization processes in educational services, as a strategy to increase the performance of these services and as an example of decentralization in education management processes.

- The trend towards a growing reduction in State funds devoted to education (Table 10), the recognition of limitations in educational budget allowances from the State and the search for rationalization of expenditure and for alternative means to satisfy demand.

The driving force for the region's educational efforts during this decade was the main educational project, formally declared and unanimously adopted by the Conference of Ministers of Education held in Mexico in December, 1979. This project received technical and financial support from UNESCO, as it constitutes not so much a rigid program but a general framework for action, to be adopted and adapted to the political, social and educational realities of each country. Its fundamental goals are:

- Elimination of absolute illiteracy in the area;

- Extension of basic schooling from 8 to 10 years;

- Improvement of the quality of educational systems.

These goals, to be reached before the year 2000, aim to eliminate the structural problems still present in educational systems that could not be solved during the last decades (7).

The Conferences of Ministers of Education held in Bogota (1986) and Guatemala (1989) to assess the development of the project and to determine a short-term action plan, have resulted in a growing awareness of these basic problems, of the need to formulate more realistic policies and to launch a common and coordinated effort.

(7) Information on different aspects of the Principal Project , achievements and activities published by regional office (17 bulletins), Santiago de Chile, 1986 to 1989.

TABLE 10. PARTICIPATION OF THE EDUCATIONAL SECTOR IN TOTAL PUBLIC SPENDING OF THE CENTRAL GOVERNMENT
1980 - 1982 - 1984 - 1986

Country	1980	1982	1984	1986
Argentina	12.2	9.4	13.4	8.5
Bahamas	21.3	19.7	22.4	21.8
Barbados	21.1	19.1	21.0	19.0
Bolivia	27.3	13.5	12.9	N.A.
Brazil	2.7	3.4	2.2	N.A.
Colombia	22.7	23.5	24.4	N.A.
Costa Rica	29.6	21.1	21.7	22.8
Chile	13.1	9.9	4.7	N.A.
Ecuador	37.5	32.9	31.4	25.9
El Salvador	18.3	18.0	15.1	N.A.
Guatemala	12.7	12.3	12.1	13.3
Guyana	11.5	9.2	7.1	5.6
Haiti	6.7	4.7	4.4	N.A.
Honduras	13.4	15.8	14.3	19.9
Jamaica	17.4	6.4	14.2	N.A.
Mexico	17.3	17.7	10.4	N.A.
Nicaragua	10.6	10.7	10.8	11.7
Panama	12.6	17.3	18.2	N.A.
Paraguay	3.9	7.7	11.4	14.4
Peru	15.6	16.4	10.0	N.A.
Dominican Republic	11.0	15.0	14.0	10.0
Surinam	0.8	0.7	N.A.	N.A.
Trinidad & Tobago	8.0	9.6	11.6	15.5
Uruguay	12.1	9.7	7.4	N.A.
Venezuela	12.5	.16.2	17.0	17.7

Source: BID - Economic and Social Progress Report for Latin America 1988,Washington. D.C., 1988.

N.A. - not announced.

In spite of the great restrictions brought about by the economic crisis in this region, the principal educational project has produced the following important achievements:

- Renewed social value of all aspects of education and, consequently, its higher priority in national development goals;

- A considerable reduction in absolute illiteracy throughout the whole region, that permits expectations of the attainment of the goal in most countries by the year 2000;

- Greater priority and growing expansion of basic education, since only Chile and Costa Rica had made the transition of 6 to 8 years for their basic education cycle during the seventies; in the eighties, Venezuela officially followed suit, while most countries extended schooling to cover not only the last grades of primary school, but also the basic cycle of secondary education.

- A growing concern and consequently the adoption of decisions to improve the quality of education. The last few years have seen the birth of important innovations, not only in terms of macro-curricular features but in regard to specific aspects of the teaching process, ie.: adjustment of study programs, teacher training, application of educational technology, production of teaching materials, improved teaching of the sciences, educational programs geared to work, production and employment, to name a few.

In education for ethnic groups, which have traditionally been marginal in the social, educational, and economic respects - particularly the native population - remarkable progress can be seen, particularly in connection with: a) recognition of the cultural identity of these groups;
b) institutionalization of basic educational programs to solve illiteracy (in the form of teaching materials in native languages, training of special teachers, educational research); c) to a lesser extent, status enhancement of these ethnic groups and their cultures as part of the country's heritage.

This decade also witnessed the emergence and surge of correspondence courses in this region, particularly at the higher level, as an alternative to broaden the educational scope to include geographically and economically marginal population sectors. Certain experiences that may be mentioned

are those carried out by UNED in Costa Rica, by UNA in Venezuela and by UNISUR in Colombia, without overlooking the radio and television broadcasts in some countries for primary and adult education in rural areas and, in several countries, the advanced secondary education, that has reached varying levels of success.

The overall assessment of the decade in terms of education may be summarized in the observation that, even if the exponential trend of the educational pyramid has not kept pace with the momentum of previous decades, and although the crisis has been felt in educational development, some progress is nonetheless evident, and important new renewal trends have become apparent. According to the scarce information available, the British and Dutch Caribbean show a highly positive evolution in the development of the basic educational levels (reduction of illiteracy, extension of primary school and preschool education).

2 - THE PROFILE OF EDUCATIONAL MANAGEMENT

The problem of educational management has grown considerably in size and complexity. The increase and diversification of educational demand have had a relatively great and deep impact on the organization and operation of the management system. However, the efforts deployed for thorough analysis of this problem and for the introduction of significant changes have been much more limited compared to the efforts devoted to planning.

Initially, management aspects focused primarily on the administration of educational centers. Analysis then progressively turned towards the organizational structure of the educational system, the outline of its functions, the introduction of guidelines for rational and efficient criteria and tools. Recent analyses are turned towards the State and its role as manager of education, and towards the balance of power between the different forces and players in the educational process.

In the countries of the British and Dutch Caribbean, which recently gained independence, these have retained certain features of the Colonial management structure, adapted to the physical and demographic features of each country.

2.1 The organic structure of educational systems

Until recently, the operational framework of educational services hinged on two basic axes: offices grouped within the Ministry of Education - placed at the seat of Central Government - and educational centers.

The structure of these ministries was relatively simple, and largely filled by instructors with vast teaching experience. These simple structures revolved around essentially two basic services: the technical-pedagogical service - staffed by national inspectors - and the administrative service, centered in small management support units. The latter handled aspects related to accounting and personnel management , while the technical-pedagogical units concerned themselves, in isolated fashion, with matters pertaining to each educational level. The insertion of educational management in public administration was slight, and modern management techniques were practically unheard of.

Important changes began taking place towards the end of the sixties, moving in two directions: on the one hand, the institutionalization of planning processes in the ministries of education progressively opened the way for the incorporation of technical processes and, on the other hand, the extension of the services and their growing diversification led to reform or to progressive adjustments in management structures that emphasized functional suitability rather than attendance records.

Perhaps the most important change in certain countries took place in the seventies when, as part of the reform of the entire State structure, certain countries created special organisms for specific educational aspects that, due to their size and complexity, the ministries of education were unable to assume. This period saw the emergence of agencies with some degree of administrative and financial autonomy - always at the central or national level - responsible for certain specific functions: culture, sports, higher education, vocational training, school buildings, and others. In other words, a form of decentralized centralization (8).

(8) Organization of American States - Educational Affairs Department. La Administración de la educación en América Latina: Estudio sobre agilización y descentralización administrativa, Washington, 1972

In consequence, the ministries saw their role progressively reduced to that of "ministries of schools". Decentralized agencies, increasingly autonomous, became closed systems, relatively disconnected from the overall system, although the idea of a system is formally retained. By maintaining control over policies, programs and resources for primary (basic) and higher education, the ministries of education (or ministries of schools) gradually introduced modifications based on the growing complexity of the different levels, the diversity of primary education (rural-urban, native, border cases, geographical dispersion), the diversification of secondary education, incorporation of other education levels into State services (adult, pre-school, special). These changes became more dynamic in the ministries of education in the early eighties.

The administrative reforms introduced into the organizational structure of the ministries of education essentially sought greater functionality in terms of distribution of functions, more flexible processes and the definition of work areas. In some cases, for greater flexibility or to implement innovations, different management styles were even superposed (9).

Certain examples of the administrative structure of ministries of education in countries of various size reveal the most salient features of educational management (Appendix). Certain structures place greater emphasis on traditional structures, by level or by teaching methods, backed by technical units (like planning), while others are experimenting a structure based on macro-functions - common to all levels of formal education - like basic credits, improvement courses for teachers, educational technology, and others. A new significant element is the institutional incorporation of several areas until recently not recognized as falling under State responsibility (pre-school education, native education, special education); but above all, mention must be made of the institutional recognition of extra-scholastic and adult education, for which methods are as remarkable as for traditional formal education.

(9) One phenomenon that has been observed since the mid-seventies but that has been gaining momentum during the present decade is the existence of two parallel structures within the ministries of education : one of these being for the management of special innovative projects, generally relying on foreign financing.

2.2 Operational levels of educational management

One fundamental characteristic of Latin American public administration is its centralized nature (10), dating from the time of independence, that acts as a measure to prevent the individual countries from splintering and to safeguard national unity. Even countries with an official "federal" system display rigid centralism, not only in the formulation of regulations and policies, but also for the management of resources, and the subordination and control of operations. Until the eighties, education was managed at and from the seat of the ministries of education. This was true in practically all the countries, even in those who had a federal structure, with some degree of territorial sectioning (States in Brazil, Mexico and Venezuela, Provinces in Ecuador and Argentina, Departments in Colombia and Peru); educational agencies at an intermediate level (regional junior minister's offices or ministries) had limited scope in terms of influencing educational services at regional level. For them, it was rather a matter of constructing certain limited educational services, with the generally restricted financial possibilities available.

Towards the mid-seventies in some countries, at the beginning of the eighties in others, and generally launched by the Ministry of Education itself, a movement was implemented for the regionalization and decentralization of education. Regionalization fell within a regionalist movement spread more or less throughout all of Latin American and based on economic considerations, while decentralization took the shape of certain actions geared to lighten the increasingly heavy operational weight of the ministries of education and/or to reduce the distances and the time necessary to manage processes and resources. These two aspects did not have parallel development.

(10) ARISMENDI P., Octavio: Problemas de la Administración Educativa en América Latina. Magazine of the Andrés Bello Accord, VIII-23, Bogotá, 1984, pp. 161-172. See also Educación en Venezuela, Report of the Presidential Commission for the Study of the National Educational Project, pp. 42-45, Caracas, Fondo Editorial IPASME, 1986.

The aim of educational regionalization was to achieve more direct coordination of the educational processes of regional development (taking into account the distance factor), to stimulate the regions to a greater capacity for regional decision-making, to assume certain financial responsibilities and participate more directly in the management of resources and processes.

Educational decentralization did not relinquish its efforts but constantly intensified, although its development was uneven throughout Latin America and within each country (11). Although decentralization largely follows the dictates of an increasinly clear incapacity of the central agencies to adequately manage educational processes and resources, and also the pressures at intermediate and basic levels to assume greater responsibilities, the process is slow and complex, particularly in countries with rigid legal structures, with impermeable centralistic attitudes and unequal operational and technical capacity in lower agencies and echelons. Furthermore, the State's paternalistic attitude, so patiently constructed over several centuries, cannot easily be overcome by those delegating power nor by those assuming it.

At this stage, it may be said that educational decentralization is an irreversible process, independent of the factors that may set its limitations (12). In some countries, this process has merely taken the form of deconcentration, in others we find a combination of deconcentration and decentralization, whereas in still other - and few -cases (Chile, Brazil and Colombia), the tendency is towards a decentralization that awards duties and management responsibilities - previously held by ministries - to municipalities or to townships (13).

(11) An interesting case of the scope of educational decentralization is analyzed by ORNELAS, Carlos, in the article La descentralización de la educación en México, UNESCO, Perspectivas magazine, No. 65, pp. 111-120.

(12) ARISMENDI, op. cit., FERANANDEZ LAMARRA, N. and VELEZ, MIRTA: Algunas reflexiones sobre la descentralización y regionalización de la educación en Argentina, Ministry of Education, Planning Directorship, Buenos Aires, 1989.

(13) For the case of Chile, see Municipalidad y educación, Centro de administracin educativa, CAE - Universidad de Concepción, Chile, 1985.

Smaller countries, too, like those in Central America, have implemented measures aiming for decentralization. In countries with greater scope in terms of population and area, like Brazil, Mexico, Argentina, Colombia, Peru and Venezuela, regional agencies (State ministries or junior minister's offices for education) are gaining increasing importance as they are being delegated wider and more important functions; in the smallest countries, decentralization is translated into action through regional educational managements, based on a delegation of functions that emphasizes program content over administrative and financial aspects. In some other - very few - other countries, the local and/or community aspect is gaining ground, particularly where the State has encouraged a new political, economic and administrative revitalization of the towns. In earlier years, certain countries like Peru and Nicaragua had made significant experiments in educational development at local level through nuclearization. An important contribution to this was, no doubt, the technical work devising methods and techniques of School Mapping.

Currently, within the framework of this decentralizing trend, the situation differs from one country to the next. Educational management still continues to be the monopoly of central units in the ministries of education, even if legal texts and political statements advocate decentralization. Nonetheless, the growing importance of intermediate (regional) and local levels is making inroads and gaining momentum in more advanced communities, in result of a political maturing process, manager training and greater ways and means of communication.

One problem that has not yet been mentioned is the organization of educational services in larger urban areas. Due to internal population shifts, certain capitals, cities and/or towns have seen their population double in less than a quarter of a century (Mexico City, Sao Paolo, Bogota, Lima, Rio de Janeiro, Caracas). Characteristic of these huge cities is the presence of large marginal population groups for which social services are inadequate, either in quantity or quality. This is particularly true for education. As these problems intensify and become dangerous, it becomes clear that there is a need and urgency to establish flexible organizational structures in urban communities, in order to provide fundamental and basic services.

2.3 Other active agents in educational management

An important aspect of the management of educational services is related to the growing expansion and influence of private education. The services provided by the private educational sector range widely, from the simplest of individual owners to organizations of some complexity, from institutions that welcome only the elite to schools for marginal sectors, from the most conventional educational centers to institutions that offer students the latest advances in science and technology, from profit-oriented educational services to non-profit making welfare and charity service organizations. In countries such as Brazil, Colombia and Chile, private education has a strong quantitative presence and considerable political power. To some extent, it is a true para-system with its own regulations and structures, even though legislation endows the State with the regulatory role in educational matters.

In general, there is no real antagonism between public and private education in Latin America, but neither is there the least operational connection that might rationalize offer, complement services and distribute responsibility. There has been very little progress by educational management on this front.

An important and comparatively new fact in Latin America is the dynamic presence of non-governmental organizations (NGO) in education, especially in non-formal and adult education areas, either through foundations sponsored by corporations, professional associations or international agencies, or through specific projects covering limited time and area. Several such organizations have played a leading role in educational innovation (popular education, professional training, community participation, among others).

Such agencies and initiatives had quasi-clandestine status at first, but in time they have gained respect, credibility and even public support.

Some of these, with their activities based on research, have even served as a support for the public educational sector to introduce innovations, while at the same time pushing private education to rethink its policies and structures, not only from a pedagogic but from an organizational point of view.

Taking into account the growth of private education as well as the increasing influence of the NGO, there has been speculation and even serious reconsideration of the formerly monopolistic role of the State in educational matters.

2.4 Administrative dynamics of educational organizations

Within the framework of the foregoing considerations, one might ask how the management functions act within the structure of educational systems, insofar as their size and complexity are considerable.

In view of the educational sector's low functionality, its reduced capacity to evolve and transform, its anachronistic and slow processes, the priority of immediacy in its response, the haziness of the definition of function and responsibility and the insufficiency of its evaluation and feedback mechanisms, certain general considerations can be put forward :

- The prospective vision of educational development : the introduction of planning in education in the sixties was, among other things, supposed to organize educational development with a view to the future, not only in regard to duration but also in terms of continuity.

However, not only the forecasting techniques used (as we shall see below) but especially the lack of continuity and even improvisation in educational policies eliminated practically all possibility of effective forecasting. Perhaps the only possible continuity in ministry guidelines is, in fact, its discontinuity, this being especially true in democratic countries where governments change every 4 or 6 years. But for a few cases (Cuba, Nicaragua and even Mexico), there is a stability in the direction of higher offices, which is a guarantee for program continuity. In some Latin American countries the average lifespan for a position in a ministry of education is one year or less, which generally entails changes in the leading officials and in programs (14).

(14) An analysis of a certain situation in a given country may be found in the document Crisis de la administración educativa: El caso de Brasil, by García Estévez Walter, Cinterplan, Caracas, 1987.

There are other factors that further reduce the forecasting possibilities of educational policy and continuity: financial restrictions that make it obligatory to focus almost exclusively on the most immediate problems, the political "cronying" associated with certain administrative offices and the management of financial and human resources, the now customary teacher strikes, and the absence of a sense of the future - all of these features that have become an accepted part of our bureaucracy. Although the application of "prospective models" for education has been proposed in the past years, these are primarily theoretical exercises with little or no consequence on the orientation of education in the mid- and long term.

Decision and policy making, planning, programming and project implementation: these functions seem to be the almost exclusive center of interest of educational management, but often the lack of managerial capabilities, sheer lack of resources or the interference of political favouritism, bureaucratic inertia and pressure from unions representing teaching and administrative personnel curtail the decision-making possibilities or seriously limit the effective execution of scheduled activities.

The weak capacity for leadership and lack of continuity among the decision makers and implementers of educational programs (with some exceptions in the region in general and within each country in particular) are serious limitations the educational systems have to face in Latin America. It must be noted, however, that in the educational sector, autonomous agencies of national scope often possess more dynamic and flexible structures, as well as managers with better technical training.

- From the point of view of implementation, the management of educational services in the region faces several problems that are more or less serious depending on the various circumstances in the different countries. The following are to be noted :

i) Little coordination between planning and implementation. It is generally the bureaucrats that deal with more or less permanent matters and seldom incorporate planned goals or projected action into day-to-day management.

ii) A duplication and overlap of functions and activities in several departments in one ministry, or in several agencies in the sector, or at different managerial levels. In countries with some degree of decentralization, both at the central and at the regional level, there is a certain duality of responsibilities of their decentralized agencies and offices.

iii) Slow and inefficient handling of routine matters, especially in regard to personnel procedures, physical and financial resources (payment, purchases, contracts, maintenance and upkeep, among others).

iv) Lack of flexible systems for monitoring and operations control - beyond anachronistic auditing techniques - to allow control of the progress of each program and project.

v) Management problems in relation with resources and the administrative process are linked to the quality and permanence of personnel. If those responsible for educational management are selected and promoted along political party lines - without the appropriate status of public official - or along simple promotional lines merely based on tenure, it is impossible to expect quality and efficiency in educational management.

- Program and project evaluation. During the last few years, evaluation of educational administrative processes has obtained growing importance. Even projects relying on international aid usually include evaluation results as an important stage and element.

But evaluation is still a little-used element in educational management, although an attempt has been made to develop evaluation methods and tools. Educational centers have undertaken action geared to the introduction of institutional evaluation as part of school management. However, at the overall system level, as borne out by the traditional administration, the prevailing criterion is one of control, aiming to supervise and verify that the legal norms and usage are respected, particularly in regard to financial resources.

No doubt this stage of the administrative process constitutes one of the weak points of the educational management in this region, a phenomenon that is linked to conceptual, methodological, instrumental, social and political constraints.

- Communication and the circulation of information. The centralist and hierarchical nature of educational management in Latin America can

generally be seen in the obstacles to the free flow of information, either within educational organizations or in the direction of the end user and the community at large.

Traditionally, when presenting results, information had restricted circulation (in particular when related to decision making), or was outdated or delivered late; furthermore, its coverage was not very extensive, whereas the final destination was a large universe.

Over the last years, the circulation of information has improved, due to the increased importance attributed to it and the contributions made by the revolution in communications, whether written, audio-visual or computerized. That is why thick technocratic reports are being replaced by other means of communication: periodic publications (magazines and bulletins), and more occasional events (special reports, technical meetings, seminars, congresses, forums, workshops, TV and radio programs, among others).

The benefits of this greater distribution of information have become apparent in a widening data base for the analysis of problems in educational programs, in the exchange of innovative experiences, in increased participation and sensitivization of public opinion.

Another positive phenomenon is the newly acquired importance that some widely read newspapers are attributing to educational information in certain countries, and the growing circulation of magazines and TV programs on educational matters for the general public. Even within educational management organizations, the implementation of flexible methods for communication and inter-institutional and inter-sector work is moving ahead.

2.5 New trends in educational management

During the eighties, financial restrictions as well as the oversized inefficiency of central educational management systems and each country's individual political and social dynamics, gave rise to the search for new ideals and

ways of readapting support structures to the teaching-learning process. Several visible trends, with different emphasis depending on the country and the political model, are the following:

A reassessment of the State-teacher role and the transfer - or recognition, at least - of the value of other spheres of civilian life (NGO), organized communities, professional groups and others. The inevitable intrusion of the private sector in education meant constant reduction of the former monopolistic role of the State in educational matters. This was a new process, in ideological and political as well as in operational terms.

- Growing decentralization of educational services. During the seventies, certain countries launched a debate on decentralization and sponsored measures to streamline - at a central level - the cumbersome administrative system through the creation of sectorial units with some financial and managerial autonomy. Some even succeeded in encouraging a certain degree of decentralization of several services at an intermediate level (15). During this decade, the issue not only gained in scope, but economic restrictions, that impacted on educational financing and political movements and led to State decentralization, now strengthened policies and steps towards deconcentration in some cases, and real decentralization in others.

However, in most countries deconcentration and decentralization face serious problems of a financial, political and operational nature. Politically, there is still fear of the risks of fragmenting national unity, splitting cohesive policies and even of further accentuating regional imbalances. There is also fear of regional and local "arbitrary influences" that strengthen political favouritism, thereby reducing the possibilities of truly integrating and renewing the organization. In the financial sphere, there are fears of seeing a chaos of deep financial consequence due to the weak capacity to manage financial resources, their limitation in less prosperous regions and towns and the low capacity for regulation and financial support on the part of the central government. On the administrative side, there are doubts as to the capacity for creating quick-response management units, new habits and new dynamic organizations, of overcoming local or clannish conflicts, of vanquishing or reducing paternalistic feeling inherited from centralism, of

(16) OEA and Arismendi Posada, op. cit.

mobilizing community organizations and others. There is, above all, a great vacuum in human resources that can lead and orient these processes: at regional level, certain countries have been training competent technical personnel, but it still remains insufficient in number. There are also serious limitations at the central level, resulting from the traditional and "vertical" attitude of officials who refuse to delegate and transfer power, to create structures and mechanisms that would considerably reduce the structures of central management.

- Educational management as an instrument to promote and orient innovation and change in education. Although the innovation effort focuses on contents and teaching strategies, the educational sector is still relatively isolated and dispersed; only recently did educational authorities begin to mobilize dynamic forces behind important innovation and change in the design and execution of educational programs. What seems most significant, but less visible, is the innovative effort at micro-level, in communities and educational centers, stimulated by directors or groups with influence over leading organizations.

The precariousness and limitation of financial resources are generating initiatives with a certain degree of creativity for the introduction of qualitative change, the reduction of costs and the harnessing of still untapped resources. These innovative currents seem to be stronger where administrative structures are more flexible, more decentralized, where they are more closely linked to social change in other sectors. At the same time, as they are expanding, these innovations demand relevant adjustment in direction and managing structures.

But the time has not yet come for the current of innovation to introduce structural change into educational systems in the form of educational policy. Besides being perceived as isolated and dispersed, these changes are designed for specific tasks of relatively short duration and limited area coverage.

- Incorporation of new management techniques. In the sixties, certain reforms were attempted in educational management sectors as a result of change in the overall public administration. The following decade witnessed the attempt to introduce corporate management techniques in some countries and institutions, but they had little effect, partly due to the resistance to change and partly due to the difficulty of translating principles and methods automatically from one sector to another and in different contexts.

Trends in decentralization and progress in management studies seem to be creating more favourable conditions for modernizing management processes in educational services. These changes are not as yet strongly perceptible and there is significant variation from one country to another, from one institution to the next and even from one presidential period to the following. Certain specific aspects have begun to be modified through the change of processes, such as the increasingly more widespread use of computers for accounting and finance, personnel management, inventories and assets management, statistical data retrieval and processing, etc.

Today, all countries in the region are using computers, to varying extent and for different applications. Only a few countries have designed and implemented educational information systems (EIS) with a relatively open mind focused on integration : Mexico, Colombia and Chile, although even here, applications are still quite specifically limited : in Mexico, to improve educational quality, in Colombia to improve basic statistics data, and in Chile to improve financial and accounting flows.

2.6 Physical and human resources for educational management

Until recently, ministries of education were treated as the "poor relative" of public administration in matters related to physical resources, equipment and technical personnel. Today, they are by no means optimal nor the best, but they are at least in line with the remainder of public administration.

As to installations, in almost all countries the ministries of education, their autonomous agencies and their local offices own the premises or buildings which they occupy. Some of these are relatively modern, fulfilling all the minimum conditions for technical work, and are usually located in easy-access areas.

With few exceptions, educational management is still generally considered as weak in the area of leadership and of administrative personnel. As pointed out above, offices responsible for management are often filled by teachers who have had a long teaching career without formal management training, with the resulting consequences on overall efficiency of the education service. In other cases, offices are filled with personnel from outside the system, ill-suited to the position, the main criteria being strictly political.

In almost all countries, however, educational management has recruited professionals from other walks of life (economists, systems engineers, sociologists, psychologists) for technical positions, or teachers trained in educational management. This integration has taken place at all levels: central management and executive positions, regional and local offices, technical-pedagogical and technical-executive jobs.

Countries without a precise status for their public officials usually have lower remunerations for technical personnel in the educational sector, which bars the incorporation of excellent professionals or hinders the possibility of retaining them. This of course means considerable personnel turnover: technical positions in educational management are often a mere springboard towards other sectors and positions.

Party politics, the discontinuity or excessive turnover in ministry and management posts, and lack of training and incentive as regards professional development often have negative bearing on the quality of the technical personnel.

The situation becomes more complex at intermediate and local levels, where only the first steps towards decentralization are being taken. Still to be tackled in depth is the issue of schools where empirical methods and the teacher's good will is the rule.

In summary, educational management in Latin America - taken as the driving force of the entire educational system - has been given scant attention in the past but, due to circumstance, it has shown important change, not necessarily planned nor systematic. To some extent, such change bears on the concept of management and direction of educational systems at the upper echelons,

but it has been mainly directed at modifying (sometimes superficially) the organic structures, modernizing certain processes, and improving physical assets consisting of material and equipment, and of personnel. However, deficiencies are still great.

3 - THE PROFILE OF EDUCATIONAL PLANNING

Latin America has perhaps the widest experience in the development and application of educational planning. When Colombia drew up her first Integral Educational Plan in 1957, the subsequent meetings and conferences of ministers confirmed planning as a tool for impelling and directing educational development in the region(*). For most Latin American countries, the sixties represent the decade that saw the great political, theoretical, methodological and institutional launching of educational planning. Planning extended its focus and became consolidated during the seventies, but at a varying pace, and with differences in organization and results. Although in most countries (especially the Andes countries: Peru, Colombia, Venezuela, Ecuador and Bolivia) the initial theoretical and practical aim of planning was to satisfy a surge in social demand, it later took into account other perspectives as a result of the social, economic and educational dynamics of the evolution in these countries. The economic dimension of education, resulting from the theories concerning human capital and from theories and studies on human resources, took on particular importance.

The predominant element in educational planning during these two decades was perhaps its quantitative vision, centered on the knowledge and quantitative expansion of educational systems and their basic components: pupils, teaching staff, school network and public budget.

At the end of the seventies, when the effects of the economic crisis began to impact on educational systems - especially in non oil-exporting countries - the dynamics of educational planning began to lose momentum and showed some loss of credibility and influence. At this time, not only were

(*) Conference held in Lima, 1958, Washington, 1960 and Santiago de Chile, 1962.

its virtues and scope under scrutiny, but a debate was also launched on the limits of theoretical approaches and the practice of educational planning itself. This debate became even more acute during the eighties (16).

To a certain extent, this critical review of educational planning runs parallel to a current of analysis and evaluation of past experience and a search for new horizons in the economic and social fields of planning (17). It would seem that the economic crisis of the region had brought to light the crisis of the model(s) for economic and social development in general and of the educational sector in particular. Consequently, the planning models on which these were based also came under critical review.

The eighties bear the mark of a crisis in planning in almost all countries, although in some of these (Mexico and Nicaragua), planning reached its peak development, and in all of them a new phase of review of past experiences and search for new technical-methodological and operational ideals was initiated.

The countries of the British and Dutch Caribbean have more recent experience in educational planning, given their smaller size in terms of geography and population, their social and cultural features - whether autochthonous or inherited - regardless of the fact that certain traits, discussed hereafter, are shared to some extent by geographically and demographically larger countries with older institutional experience.*

(16) A critical and relatively exhaustive analysis has been carried out by Moncada, A., La crisis de la planificación educativa en América Latina, CINTERPLAN, Caracas, 1982.

(17) The analysis in the document El proceso de planificación en América Latina: escenarios, problemas y perspectivas from CEPAL is worth mentioning. Aldo Solari, Edgardo Bominga, Rolando Franco and Eduardo Palma (Santiago, 1980) and the documents submitted to the International Colloquium on New Directions for Planning in Market Economies (CEPAL Magazine, No. 31, Santiago, 1987).

(*) See on this subject Educational Planning for Small Countries, CINTERPLAN, Caracas, 1987, and document La planificación y administración de la educación en Aruba y el Caribe, by Ralph R. van Breet, 1989

Let us now examine the more salient features of educational planning in the region.

3.1 Institutionalization of educational planning

The importance and value attributed to the role of educational planning in Latin America since the late fifties and more particularly during the two following decades are seen in the legal and institutional recognition of planning in the sector. Thus, at the beginning of the eighties, all countries had institutionalized their educational planning departments based on different programs, ranks and strategies, the more prominent features of these being the following (18):

3.2 The place of planning units within organizational structures

In certain countries, planning units rank at a high level equivalent to that of Vice-Minister (eg. Mexico : Under Secretary, Brazil : Secretary) or General Directions (Argentina, Bolivia, Ecuador, Honduras, Nicaragua and Costa Rica). In these countries, planning units are linked to the administrative structure of their education ministries. Their basic functions are to draft budgets, policies, plans and projects and, to a lesser extent, to dynamize administrative processes. They enjoy a relatively high degree of vertical and horizontal coordination with the decision-making power.

(18) Elements mentioned in this section are based on the results of the study entitled El estado del planeamiento educativo en América Latina y el Caribe, made by the Interamerican Center for Education Planning Studies - CINTERPLAN - the following volumes of which have been published: I - Mexico, by J. Prawada; II - Central America and Panama, by Lorenzo Guadamuz; III - Bolivia, Colombia, Ecuador, Peru, and Venezuela, by José N. Revelo V - Argentina, Chile, Paraguay and Uruguay, by Inés Aguerrondo, Marcial Olivares and Margarita Salcedo; and, VI - Dominican Republic and Haiti, by Emil Alvarado and José Almea, Caracas, 1987.

In other countries, planning units are structured as basic units or staff directly linked to the Minister's office, and with little coordination with other management units such as sector agencies (Colombia, Peru, Venezuela, Panama) or as technical units with some status (Guatemala, Dominican Republic, Chile).

Uruguay is a case apart, given the complexity of the educational sector's organic structure, in which functions are shared between the National Council of Education and the National Educational Administration, in whose dual structure the region's planning functions are diluted.

Whatever the different organizational places that planning has within the organizational structure, its importance is due not only to its hierarchical level but also to the importance or value given to planning functions, which are rather contingent in countries with a high degree of turnover in management posts, especially for the position of Education Minister.

3.3 Inter-sector and intra-sector coordination

In relatively large and populated countries where a certain degree of "decentralized centralization" may be found, that is, the distribution of functions at the central level among ministries of education and autonomous agencies responsible for educational areas (higher education, school construction, development of science and technology), the planning function is usually dispersed and even scattered where administrative and financial autonomy carries with it some autonomy of policy. This type of decentralized centralization makes total planning difficult and even impossible, which in turn leads to a splintering of educational systems into isolated parts. The fact of concentrating the sector's planning in the organism principally responsible to the head of school administration means that no attention is paid to other players who also have their own planning and for whom final coordination is non-existent.

The intra-sector coordination necessary is therefore generally inexistent, and even simple and obvious coordination of intra-sector agents is difficult. This

separation is particularly significant between the developments at base levels, run by the ministries of education, and higher education, regulated with autonomous policies.

It is important to note that, although in most countries educational planning originally began and developed on the fringes of planning for global development, the latter progressively sought links with the planning in other sectors. Central organizations responsible for planning (ministries, general directions, administrative departments and others) have sought to implement in their workings the policies, plans and projects for the sector through institutional mechanisms of coordination (for example, educational agencies closely linked to planning units in educational organizations). These relations are more formal than operational and more apparent in statements and documents than in actual operation. However, the need for such coordination is becoming increasingly recognized. Past and present restrictions in this connection stem rather from conceptual reasons - connected with education and development, for example - than from methodological and operational considerations (inter-sector coordination mechanisms). The same may be said about the coordination of educational planning with other sectors. Only recently has the concept of "social planning of development" been emphasized, but this phase is only at its initial stage.

3.4 The operational levels of planning

Officially, and in almost all countries, it is possible to recognize the following levels of educational planning related to the evolution of the organizational and administrative processes of educational services: central, regional, local and institutional.

a) At the central level are ministry planning units and their autonomous (or decentralized) institutions, related to some extent to agencies for development planning . With few exceptions, the latter have historically concentrated on large-scope planning action and have had a certain degree of continuity.

b) The intermediate level (improperly called "regional") is in all cases represented by agencies responsible for educational activity at state, province, department and regional level. Although, in terms of economic and social aspects, regional planning has had certain important theoretical and methodological developments, the regional approach to educational planning has not gone beyond mere words. Nonetheless, this is the decade that saw well-publicized consideration being given to analysis and debate of educational regionalization, particularly at the level of regional forums (19). The steps taken to give these declarations theoretical, methodological and operational implementation in planning have been slow, restricted and are merely beginning.

To a great extent, the possibilities of regional educational planning are under the strong influence of the scope and the political, legal and administrative possibilities of educational decentralization (20).

Regional educational planning is still at an exploratory stage, and there are many questions as to its pertinence, its viability and areas of application. For obvious practical reasons, these efforts concentrate on incumbent political-administrative divisions, and only in rare cases on regional socio-economic structures. Only exceptionally has any conception of a regional scope going beyond political-administrative boundaries been developed for the needs of educational planning and management.

(19) Special mention must be made of the IX Meeting of the O.A.S. Interamerican Council on Education, Science and Culture held in Bogota (Colombia) in July 1980, which approved Resolutions 460/80 and 468/80, entitled "Bogota Consensus on the Educational Regionalization on a National Level. "La Revista de la Educación", No. 87, reviews the main preliminary work and experiences, Washington, 1981.

(20) As to experience, approach and results, see the report of the 1st. Interamerican Workshop on Educational Regionalization that took place in Santiago de Chile from 20th. to 24th. April 1981, CINTERPLAN, Caracas, 1982.

c) Local level

Peruvian educational reform during the seventies restored and re-enhanced the value of the basic level of educational development when it selected the community educational centres as its basis, and therefore hinged planning onto that level. By the end of that decade, several countries had started experiencing the ways and means of local educational development heavily emphasizing the role of the community : integral rural development, educational cells, educational communities and others. Those experiences have been reinforced thanks to the contribution of research and planning and to popular educational movements. The last five years have witnessed a current of decentralization and a socio-political and economic revaluation of the municipality as a part of the overall socio-political democratization process of the countries in this region. Although this experience ranges from the total restitution of educational services to the municipalities (Chile), to a progressive delegation of resources and functions (Colombia), or consists of entrusting these communes with pre-school and basic educational levels (Brazil), there is a widespread and progressive recognition of the local level, in particular from the municipal area. This recognition falls within a framework of mutual coordination between educational and community processes, an increase in resources and a search for the applicability and social quality of education (21).

This being an incipient process, it will be difficult to overcome the obstacles set by rigid centralism, the paternalistic attitudes in local communities, the scant capacity for local management, the difficulty in communications, little basic organization and insufficient training of resources to manage a local development of education.

Educational planning has had a few limited - rather indirect - developments in large cities, where urban planning has gathered momentum and new importance. Its influence on the educational level is almost imperceptible and is only expressed as the complex educational building process, or certain projects focused on marginal urban areas (Integral Care centers in Rio de Janeiro). This field is as yet unexplored.

d) Planning at institutional level and in relation to educational centers. During the last few years, certain school administrators have fostered new planning processes in educational centers as an instrument to organize and rationalize work and reinforce budget demands. Though there is scant information in this respect, it must be noted that this current is gaining

(21) Some experiences and thoughts on the subject may be found in "Educación Municipal" magazine, No. 1, Cortez Editora, Sao Paolo, 1988.

strength as training opportunities are widening along with qualifications for school managers.

3.5 The scope and field of educational planning

During the last two decades, educational planning placed the basic emphasis on the elaboration of plans, and therefore fostered those planning stages that inevitably had to lead to a formal document comprising certain plans, applying the most widely represented techniques and methodology. In some countries where educational planning had not made significant inroads these stages have been rather rigorously followed, in most, however, explicit or implicit planning has become more flexible and has followed strategies and paths that are more in fitting with current situations. The traits most often present are:

a) Traditional diagnosis, fundamentally based on the processing of statistics - often exhaustive - and centered on the inner dynamics of the basic components of the formal schooling systems, has a tendency towards a more analytical view of educational problems and the identification of basic educational needs resulting from more structural interpretations. Here social research and sociology have had an especially important role. Thus, statistical diagnosis has led to basic studies of the educational situation, interpreted in its inner and outer relationships, nurtured by contributions from educational research that is still weak but increasingly gaining in value.

As of the mid-eighties there have been warnings against excessive diagnosis without much practical application or use. The growing availability of statistical information - with the help of computers - and the results from several more or less comprehensive research projects and studies, give a rather reliable outlook on the more critical problems of education.

b) The formulation of educational policy. It is taken for granted today that planning is a part of the governmental process, either as a technical tool to implement a political project, or as an inherent element of the structure of

the modern state. It has therefore been said that "what partially characterizes the capacity to govern, is clarity in the formulation of policy and in the making of decisions that spur to action" (22).

Even if it is true that, in the past, planning had a leading role in the redesigning of educational development, it cannot be said that the planning process has been the generator and mobilizer - in the narrow sense - of educational policies and orientations. It has mainly fulfilled the role of implementing policy within a given framework of technocratic rationality and efficiency revolving around the economic and operational feasibility of plans and projects, irrespective of political and social viability.

Strictly speaking, it cannot be said that Latin American countries - with few exceptions - have explicitly formulated and implemented educational policies with any degree of continuity, coherence and realism (23). In this respect, the following facts are to be pointed out:

- Only seldom and in few cases, have the governments in the region formulated and implemented educational policies in an explicit, clear and continuous way.

- There is often little evidence of a clear relationship and interdependence between diagnostic results - problems and needs - and the proposed goals, programs and projects.

- In those countries where change in development plans corresponds to changes in the government (eg. Mexico, Colombia, Venezuela, Ecuador, Costa Rica), there is no close relationship between the following steps: electoral promises, electoral program, government plan, government action, planned results and actual results. There is generally only some slight coherence between governmental action (not always adapted to a plan) and the results achieved (24).

(22) Matus, Carlos: Planificación y Gobierno, in CEPAL magazine, No. 31, pp 161-177.

(23) Aguerrondo Inés. As an example, the Argentine case in El planteamiento de la educación en la República Argentina, CINTERPLAN, volume 5, PP 26-28 may be consulted.

- The origin of implicitly or explicitly expressed educational policies is not always clear. They are often related to pressure groups (eg. political parties, the Church, trade unions, fiscal policy and others), or, in the case of "strategic" projects supported by outside financing, tied to the demands of credit organisms.

- In some cases, there have been attempts to base educational policies upon a certain degree of social participation; this is the case for the National Educational Consultation in Nicaragua, or national pedagogic congresses in certain other countries.

It is thus evident that planning processes have had but slight influence on the identification, formulation, adoption, implementation and validation of educational policies. This is perhaps where one of the serious drawbacks of planning in the sector resides.

c) Development of plans, programs, projects and budgets

Planning has largely been devoted to solving the following problems :

- Working out and drafting plans, although the role of the plan as a working document has become increasingly relative.

- Program and project design and evaluation, not only within the framework of current sector budgets but also within outside financing. The existence of projects financed abroad - especially when particularly high investment is involved, such as in the construction or equipment and educational material for schools - is more and more frequent, given the sector's financial restrictions that allow budgets for no more than salaries and certain social expense. In this respect, most countries have launched projects - like the one for educational quality improvement - with the support of credit from the World Bank and the Inter-American Bank, AID and multilateral aid from agencies such as UNICEF, PNUD, UNESCO and bilateral aid from certain countries.

(24) Matus Carlos, Op. Cit., p. 162

Certain planning units in education ministries seem to be increasingly involved in this type of outline work, and less in the evaluation of processes and results. They are normally supported by national global planning agencies. In this respect, there are still certain limitations for project identification, formulation, evaluation and negotiation.

d)Evaluation of educational projects and programs

Although its importance has been recognized, efforts are not yet systematic and their results do not yet readily revert to the source, preventing proper feedback into the educational planning and management process. Neither is there adequate technical training, nor institutional mechanisms and methodological instruments for the follow-up and monitoring of plans, programs and projects, in order to ensure coordination between data and implementation.

e)Budget programming

An equally important and growingly absorbing task of educational planning units revolves around budget planning. Often it is not a question of drafting a budget with the utmost care in terms of technicalities and details to ensure its smooth passage (through legislative chambers and finance ministries): due to contextual reasons (teacher strikes, natural disasters and inflation problems) it is often necessary to update and readapt it almost permanently. This effort deployed in budget accounting has not yet been examined as to cost analysis, rationalization of expenses and a systematic approach to new financing sources.

f)Statistics and information

A traditional and relatively absorbing task of educational planning agencies is the gathering, processing, analyzing and publishing of the sector's basic statistics, both for planning uses and for publication. As the importance and significance of the scope of this information, computer achievements, and the organisms responsible for the sector's planning have gained recognition and status, the latter have not been content with merely improving their data processing instruments.

Certain countries have slowly moved from relatively simple statistics services to multiple-use educational information systems - EIS - providing more reliable, greater and more widespread information. This has been one of the most significant contributions in terms of the function and driving capacity of planning. Although the process is just beginning, preliminary results in certain countries seem promising.

g) A boost to the management process

Some educational planning units have assumed the role of promoting - and even leading - administrative re-organization processes like the decentralization of planning and the systematic reassignment to multiple levels (regional, basic and institutional planning). This role habitually rarely scheduled in the functions attributed to planning, and so far has been but shyly encouraged.

h)Planning and decision making

Although there is a formal theoretical and factual link between planning and decision centers, it cannot be said that planning has a direct influence on the way major decisions are taken in educational matters. Rather, these centers often submit to a personal influence from the planning directors, especially when nomination to this position can be freely made, as is the case in most countries.

However, this also results from the fact that planning action is reduced to the technocratic level, and from the little creativity and inspirational capabilities of planning. Determining factors are multidimensional: decision makers do not generally manifest a great capacity for seeing beyond party interests, contextual pressure or a certain shortsightedness towards the socio-political value of education.

The planners often have a rather antiseptic, instrumentalist concept of planning, conditioned by methodological possibilities and a given number of means for implementation.

From the political point of view, the limitation lies in the separation between planning action and government action, with all the implications that it entails, plus little capacity for compromise and consensus.

The foregoing is related to a coincident phenomenon: the lack of capacity observed in the region for generating and encouraging innovation with significant impact on the teaching-learning processes, for improved classroom work, and for transforming the pedagogical and exclusively endogenous dimension of education.

i) Planning as an instrument for channeling international cooperation

We have already mentioned the role of planning in the formulation of programs and projects financed with outside resources. This represents an important contribution, at times resulting from the demands of cooperation agencies themselves, and at times generated by the own dynamics of planning operations.

3.6 Planning resources

Generally speaking, planning units receive more and better resources in function of the wider political space and greater technical influence they possess. The following comments can be made in relation to this fact:

a) Economic resources. In general these cover payment of wages and salaries, which, under equivalent conditions, are or tend to be equal to those in the remainder of the public sector.

b) Equipment. Both in terms of premises as in relation to production means and minimum operating equipment, the central planning units are usually among the best equipped in the ministries of education. As to relatively complex equipment (micro computers, for instance), central planning units usually have the most powerful systems, even above capacity.

c) Human resources. Planning is one of the educational fields where the greatest efforts have been made to train qualified personnel, either at international centers (IIPE and European and American universities) or in regional programs or courses. In this respect, national planning units in the ministries have qualified teams, although frequently excessive political turnover and the salary conditions do not facilitate career development and make it difficult to retain the more highly qualified in place.

Almost all countries show a tendency towards shaping teams that are to some extent interdisciplinary (educationalists, sociologists, economists, architects, engineers, accountants), which does not immediately result in interdisciplinary work. Countries with weaker or more recent planning services lack personnel specifically trained to handle methodology and planning techniques.

This means that, in general, central educational planning units (ministries and autonomous agencies) have a satisfactory resources structure within the limits imposed by the crisis in the educational sector.

On the other hand, in countries at the decentralization stage regional planning services show lacks of all kinds. In general, regional planning - and this is even more so with local planning - is a reflection, in almost all countries, of regional inequalities in social and economic development in general, and in educational development in particular.

(25) Guadamuz, Lorenzo, analyzes in detail the main aspects presented here in the document El planteamiento educativo en Centroamérica en la hora de la guerra y la paz, Chapter 11 of volume 11 of CINTERPLAN study, pp. 23-29, Caracas, 1987.

3.7 Tendencies in the evolution of educational planning

As discussed above, this decade has generated general analysis and review of the theory of developmental planning, its approach, methods and practice, this being especially true in educational planning (26). Witness to this is the critical review of theory and practice and the search for new perspectives, which has led to recognition of the intrinsic and outer limitations of planning, compared to an earlier tendency to transform planning into an "exercise in optimism" or into a universal panacea.

Wide discussion has been generated in various places about the true possibilities and restrictions of planning in this sector. As a result, within the planning effort itself, there have been certain changes that are coincident with or substitutes for changes in in the approach to education, macro-planning and social development. Perhaps the most outsatnding are the following:

a) The emphasis on planning as a function of educational improvement. This is expressed through emphasis on the quality of educational policies and the design of "strategic projects" along these lines. In Latin America, certain traditional separations in educational planning seem to have been bridged through this process (for example, systems planning and curricular process planning, quantitative and qualitative planning). Such planning often takes separate or contradictory directions, even from the a conceptual and ideological point of view.

b) Passage from hierarchical to participative planning. The planning paradigm of "center of the periphery" was the former dominant theory and particularly practice of planning. This stemmed from the rigidly centralist nature of educational direction, from the predominantly technocratic conception of the planning process and a homogeneous conception of educational development.

Once this ideal was exhausted in technically well-structured plans that were seldom applied, planning was able to move ahead at the intermediate and basic levels. This implied not only alternative criteria for factor allocation but also a slow change in the conception of educational development, its planning and management (27).

(27)Arrien J. B. and Matus Lazo R.: La planificación participativa de la educación. UNESCO's subregional education office for Central America and Panama, San José, Costa Rica, November 1988.

The emphasis or importance attributed to basic planning under the name of micro-planning results from several factors, among which are the stagnation of decentralization at the intermediate level (thus generating another centralism), the contribution of research action that correlates research activity to transformation in the field researched , and the legal and political revaluation of basic administrative units as an instrument to carry out societal democratization.

a) Planning with active agents. A vertical and technocratic planning implies above all that some do the planning for others. As long as planning is not restricted to the mere application of techniques and instruments, nor confined to a government bureau, it will seek support from institutional and social agents. It thus pursues a higher degree of consensus of social participation and of coordination between those who plan, those who decide, those who implement, and users.

b) Planning focused on processes and not solely upon the end product. In the past, planning was associated almost exclusively with the idea of the document-plan. Progressively, planning acquired the connotation of being a process that "corresponds to a continuing phenomenon, closely linked to other social processes and only recognizing partial goals, given that societies constantly adopt new objectives and that one political project may be succeeded by a similar or different one" (28). Consequently, planning has a tendency to become more flexible and to become an organizatal social practice.

c) Contextual and contingent planning. Political-social change and serious financial limitations in education make it necessary for planning to adjust to particularly complex contextual conditions, thus sacrificing some programme rigidity.

d) Non-formal and permanent educational planning.

Traditionally, educational planning has been almost exclusively devoted to formal education. Recognition and valuation of extra-scholastic and non-official education is becoming of interest to educational planners.

(28) Aldo Solari et al., Op Cit., p. 6.

In its original form, this trend is expressed by the incorporation of non-formal education, the formulation of policies, plans and projects, although this is still in the early stages.

Educational planning has also progressively incorporated educational aspects that had not previously been taken into account, such as bilingual and inter-cultural education (for indigenous populations and other traditionally marginal ethnic groups), women's education, border-zone education and others.

An especially complex problem in Latin American - education and its coordination with the world of work - has not yet found a significant answer in the formal educational planning of the region.

Para-systematic education, or professional training, generally placed outside the system, and higher education have sought pertinent answers, but fundamentally the central problem is still very much present and poses considerable challenges to educational planning, in particular due to the transformations in productive processes resulting from technological change, compared to the relative rigidity of formal education.

3.8 Updating planning techniques

The sixties and seventies were particularly rich in refining and using planning techniques. The most important contributions during the eighties include the following methods and techniques:

a) Use of EDP and of instruments to automate data and processes.

b) Use of new approaches and participative research methods to identify and analyze educational problems and needs.

c) In certain cases, the attempt to use prospective models, like the construction of future educational scenarios.

However, it must be pointed out that no serious effort has been made in the region to refine certain techniques related to critical aspects such as the influence of internal migration on access to, and permanence in school; cost analysis and alternative models for resource allocation; educational network design in scattered or heavily concentrated population areas; specification of "regional" or "local" features in educational development, methodologies for inter-sectorial work, and others. This means that the advances made so far in respect to methodology and techniques, are far from sufficient to tackle problems, old or new, from fresh dimensions.

In summary, educational planning in Latin America and the Caribbean, although manifesting certain symptoms of crisis and loss of credibility, also shows interesting positive trends that, no doubt, will determine its role in the next decade: the present time is a transition period.

4 - TRAINING OF EDUCATIONAL PLANNERS AND MANAGERS

The sixties and especially the seventies saw the launching of important training actions for personnel in educational planning activities. Initially the personnel training was done outside the region, in major international centers such as IIPE and certain US universities, given the lack of experience within the area and the non-existence of qualified personnel for such tasks.

During the seventies, certain Latin American universities launched systematic training programs, particularly with the support of the Organization of American States - O.A.S - and UNESCO.

The number of institutions and training programs increased during the eighties, particularly at the graduate level (Brazil, Venezuela, Mexico, Peru, Costa Rica); specialization has been emphasized and non-conventional training and update actions have been attempted.

4.1 Training needs

In most countries there is an absence of precise studies and inventories of training needs for educational planners, namely with respect to quantity and diversity. Currently, the need is being felt to train staff to progressively assume more and growing responsibilities in the planning and management of educational systems at different organizational and operative levels. There are quantitative and qualitative lacks in almost all countries, not only to train new personnel but also to update the existing manpower. There are three main areas with different degrees of urgency and importance, according to the countries and organizational levels of their educational systems:

a) Training types: There are three basic types of needs among technical personnel in the region:

- Training young staff with leadership capacity.

- Training personnel presently working in educational planning and management and lacking adequate instruction for their present tasks.

- Updating the knowledge of all responsible personnel, in theory, methods and operations.

b) High priority areas: Although needs seem to be equally shared between the two main areas of planning and management, there is a sense of greater theoretical and methodological deficiency in the different specific fields of management (direction, resources management, information systems, etc). It is also urgent to focus efforts on the training of personnel in charge of supervision at various levels.

c) Levels: A great proportion of training efforts in the recent past, within the countries and abroad, has been directed towards central-level personnel (ministries of education). To a lesser extent, there has been an attempt recently to fill the great deficiencies at intermediate (regional) and

basic levels (local and institutional). The needs at these levels are enormous, and will most likely constitute the greatest challenge in the coming years.

It is necessary here to combine training action (long term) with systematic, firm training action of greater variety. Such needs are more urgent in countries where decentralization processes are being fostered and where geographic and demographic size make for greater quantitative demands.

In the shorter term, it is necessary to undertake studies attempting to pinpoint priority needs, so that qualifications and training action may be more closely related to a sclae of priorities.

4.2 National and regional training and research programs

Until recently, only a few rare educational institutions had training programs with some small regional coverage. Such actions, especially in training, were directed at the graduate level (MBA) in Educational Planning and/or Management. As educational graduate studies have developed, programs for managers/planners in education have become more widespread.

As a strategy within the framework of the Regional Action Plan of the Principal Educational Project (Mexico, 1984), UNESCO's Regional Educational Office for Latin America and the Caribbean - OREALC - has propounded the creation and implementation of the Regional Training, Innovation and Management Network in Basic Educational Planning and Management and Literacy Programs - REPLAD. This network was created as a regional mechanism to support training and research action in such fields at the regional level.

The network was officially created in Panama in 1966, preceded by certain support actions aimed at national training activities in certain countries.

Today, approximately 23 institutions and programs from Latin American and the Caribbean countries belong to the network. In certain countries it has achieved an successful symbiosis between training institutions (universities and higher education centers) and the technical units of educational management and directional organizations - in particular, educational planning units within ministries of education (29).

Among REPLAD's principal actions, the following are to be noted:

a) Support for national training courses;

b) Four regional technical meetings to propose training and research strategies in this field;

c) Design and implementation of the Regional Training Course for Trainers in Educational Management and Planning, aimed at the re-conceptualization of the theory and practice of planning and management in education;

d) Development of basic training materials for qualification programs at local level, in cooperation with the Executive Secretary of the "Andrés Bello" Accord - SECAB - and the National Training Service - SENA - (Colombia).

4.3 The quest for new strategies and training methods

Through institutions, training and research programs, new ideals and new alternatives for training officials and staff are being encouraged in educational planning and management.

(29) A detailed description of the background, organization, main activities and achievements of the Network may be found in the document "La Red Regional REPLAD: Una estrategia innovadora para la capacitación de Administradores Educacionales", by Jiménez, Jorge, OREALC, CAE., Santiago de Chile, 1986.

Thus important changes have progressively taken place in training conditions, drawing benefit from the major contribution of the educational experience using correspondence courses in the region (Costa Rica, Venezuela and Colombia). This change in training strategies is also directed at a redefinition of the approach, theories and techniques for planning and managing education, although this process is slow and relatively complex.

The scant contribution from research is centered on analysis of organic structures in educational planning and management, the incorporation of participative research in educational planning processes and certain studies on organizational behavior within teaching organizations.

5 - INTERNATIONAL COOPERATION IN THE FIELDS OF EDUCATIONAL PLANNING AND MANAGEMENT

Since their inception, the introduction and consolidation of educational planning processes - to a greater extent - and management - to a lesser extent - have benefited in Latin America from wide and varied international cooperation, both bilateral and multilateral.

In certain cases, planning and a relative modernization of educational management structures have been tied in part - or even totally - to all foreign assistance, to such an extent that frequently in certain countries the introduction of planning processes is attributed to the direct influence of international agencies. This was true to a large extent during the sixties and the seventies but such assistance or cooperation considerably decreased or took other courses during the eighties. At the early planning stages, the emphasis in cooperation was placed on technical assistance by specialists, provision of scholarships for the specialization of personnel abroad, the organization of courses and/or technical meetings, supply of materials (books, magazines and other contributions), and limited financial support.

During this past decade, international cooperation in the field has changed its style and intervention, partly due to intrinsic conditions and partly due to limitations in international cooperation because its increased cost and the financial weakness of the agencies. Among the changes in conception in international cooperation, the following should be mentioned:

a) Introduction of the horizontal cooperation concept;

b) Relativization of direct technical assistance under the "expert or specialist" mode;

c) Greater benefit taken from the broad Latin American experience and recognition of the need to reassess planning and management strategies as a result of the internal dynamics of each country, in function of needs, characteristics, state of development, organic structure of educational services, etc.

Over the last few years, the new roles and forms of cooperation in educational planning and management in the region have shown the following characteristics:

5.1 Cooperation in function of greater and better circulation of information

The existence of competent technical staff - at least at central level - has led to fast, flexible and appropriate information flow among countries, on the theoretical, methodological and operational level. Some of the mechanisms used are:

a) Circulation of publications, training material and information, magazines with regional scope;

b) Technical meetings, seminars, symposiums to assess experience, achievements, limitations and even to seek and suggest joint action. These types of event tend to have more precise goals, more dynamic and participative modes of organization, less ritual, greater openness to discussion and ample analysis of problems.

c) Seminars, short-term training courses or updates in specific areas for technical staff;

d) Training courses or "field trips" on an exchange basis with other countries and/or projects to understand and analyze the latests innovations, thier problems, limitations and possibilities.

In spite of the achievements attained in the transfer of information, and taking into account the major contribution of computer and communications systems, the region has not yet made great advances in this field, particularly as regards the need to widen the range of users of this information as much as possible.

In future, the constitution of other information systems and networks, more direct utilization of mass communications, and greater flexibility of institutional planning and management mechanisms may make better exploitation of this type of cooperation possible.

5.2 Development of regional networks run by institutions and specialists

Cooperation efforts have been relatively dispersed and not systematically organized, and there has often been a certain amount of rivalry among the institutions providing funding, or at least a lack of coordination. This has also been true even within the individual countries, thus leading to a reduction in capacity and in the positive effects of cooperation. Over the past several years, attempts have been made to find mechanisms to coordinate cooperation efforts from different sources effectively, and, at the same time, to orient these towards a more or less realistic list of priorities. REPLAD has tried to fill this function.

Slowly, it is true, it is nonetheless generating national networks to broaden coverage and multiply the effects of guidelines and major actions.

5.3 Development of joint research studies in the field of educational planning and management

This field offers little result, but relative consensus exists as to its necessity or pertinence.

The actual possibilities are great, particularly at the level of training institutions, academic studies and research centers.

5.4 Regional and international cooperation and the role of UNESCO

In recent years, regional cooperation in the field of Educational Management and Planning has come mainly from UNESCO, the Organization of American States and the "Andrés Bello" accord. More or less explicitly, but increasingly, other agencies have become involved in the increase of programming and managing technical capacity in educational organizations, among them the two main credit institutions for the educational sector, the World Bank and the Interamerican Bank for Development. Considerable support has also been furnished by bilateral agencies such as AID - United States, IDCRT - Canada's, the Institute for Latin American Cooperation - Spain, and certain private foundations. In some cases, such as in Central America and Bolivia, UNICEF and PNUD have made timely and valuable contributions.

The past and present role of UNESCO in cooperation - mobilizing ideas and initiatives, supporting innovation, conciliating interests, detecting tendencies and signalling objectives - deserves particular mention. Its power as a unifying force, based on the preponderant roles it has played in the past, enables UNESCO to act as a coordinating strength, as a summit peak of convergence, as a driving force - due to its relative ideological and political independence, its regional representation and its experience at world scale. This is represented by UNESCO's head office, its Regional Education Office, its sub-regional quarters and its Educational Planning Institute. This technical potential has played an important role in the past and will have significant influence over the so uncertain future of Latin America and the Caribbean.

Regional and sub-regional cooperation has also played an important role in several fields: training, design and distribution of materials, the exchange of experiences and initiating research efforts.

However, it needs to be strengthened, better coordinated and regulated to match national needs and characteristics, especially at a moment when restrictions in the resources of the different countries and of international agencies make it imperative to rationalize spending and budget organization.

6 - PERSPECTIVES IN EDUCATIONAL PLANNING, MANAGEMENT AND EVALUATION

The future of educational planning and management in Latin America and the Caribbean is closely related to the future course of education, which in turn is subject to the social, economic and political changes in the region and the role of planning as an instrument to implement a political project. Analysis of the trends in Latin American economy on the world scene is rather pessimistic. "We can expect to gain the way to immediate developmnt neither on the basis of external demand nor as a consequence of a gross formation of fixed capital. As regards growth, this decade will end in failure, without the possibility of attributing the blame to planning; planning has - generally - been ostracized". In the light of this reasoning, it is not unreasonable to expect that "the influence of short-term planning will remain quite limited, but for few and important exceptions" (30).

In the mid and long term, although uncertainty is even greater, there may be greater hope, insofar as the present crisis will be the source of important economic, social and political transformations in the region. Thus, it is recognized that, although obsolete educational development models still in force have indeed succeded in building an educational infrastructure without parallel in history, new Latin America social and economic ideals drive to critical and courageous thought, and make it obligatory to propose concrete steps, with risks but attainable, to carry on the revolutionary work of our forefathers".

(30) A. H. Costa-Filho: "Los Nuevos Retos de la Planificación". Speech delivered before the XVI Interamerican Congress on Planning (San Juan de Puerto Rico, 22-26 august, 1988. Published by ILPES, Santiago de Chile, 1988, pp. 8-9.

The new ideals proposed for Mexico by the author quoted above may be applied to the remainder of the region: persisting inequality and injustice for certain geographical areas and social groups in the distribution of educational goods and services; the effect of change in population patterns and urbanization on the educational pyramid; the backwardness of our educational systems in connection with accelerated scientific and technological development at world level; the persistent scarcity of financial resources and the growing presence of educational union corporatism. To this should be added the growing tendency towards the decentralization of educational services and the strength of non-conventional educational alternatives (31).

6.1 Revaluation of the strategic role of education

If we consider that the future of the region is increasingly interdependent with and related to the world scene, it will be deduced that "the strength of the participation in world markets is closely related to the countries' capacity to add intellectual value to their natural stock of resources. It would be illusory to desire a strong position in international markets if the countries cannot incorporate technical progress with these assets" (33).

This means that, in addition to the social and political value of education, its economic value is today reconfirmed, associated with the capacity to generate and incorporate scientific and technological progress.

(31) Prawada, Juan: "Logros, inequidades y retos del futuro del sistema educativo mexicano". Grijalbo, Mexico, 1989.

(32) A. M. Costa-Filho, op. cit., pp. 10-12

(33) E. Fjanzilver: Industrialización en América Latina: de la caja negra al casillero vacío. Cuaderno de la Cepal, No. 60, p. 165

6.2 Redefinition of the role of the State in education

As indicated above, in most countries the educational role of the State was not doubted, until recently, even where it was of a monolithic nature. The financial and institutional limitations in face of a wide and varied demand, the rigid structure of bureaucracy, government difficulties and the current re-conceptualization of educational models and practices, all led to renewed evaluation of the role of the Educator-State (34), subject to analysis and debate (35). This is not an isolated phenomenon but an issue linked to analysis of the State and the problems of society, with obvious implications for planning, based on the grounds and the capacity of the State to act as the sole leader in matters of development.

6.3 Indivisibility of the process of design, implementation and evaluation of educational action

If planning, management and evaluation are conceived as interdependent and interactive stages in the leadership process of an organization, it could in future lead to an interaction of the theoretical-methodological and practical logic of these phases resulting in indivisible set of systems. This conceptual, methodological and operational union would contribute to diminishing maladjustment, lack of coordination, if not even even dichotomy within a process that administrative theory considers unitary.

(34) Tedesco, J. C.: El rol del Estado en la educación. Paper prepared for the Seminar on the Future of Strategical Educational Planning (IIPE, November to 2nd. december 1988).

(35) CEPAL has undertaken a wide analysis in this connection. See documents La especificidad del Estado en América Latina (august 1988) and documents Papel del Estado en las opciones estratégicas de A. L. Existence of the planning state in the present crisis, CEPAL Magazine, No. 31.

Until now, there have been not only solid barriers separating such stages, but they have frequently developed into different and in some cases divergent theoretical frameworks.

Furthermore, in the specific treatment of the educational aspect, they have lost coordination with the macro-processes of development planning, process and resource management, and social evaluation of the processes and results. This view reinforces the need for interdisciplinary and interprofessional work, in no way meaning "unidimensionality" but, on the contrary, founded on "multidimensionality" (36).

a) Planning is to be conceived as a governmental instrument and process, where the major stakes are at times ideologies but, more often, the interests and interrelations of power structures. In this sense, to govern means managing a society, a multidimensional and multi-faceted organization.

b) The different stages of the process must be structured interdependently and all must have a specific weight.

c) Government structures are to be redefined, by setting up and coordinating functions (planning, implementation and policy) in view of great goals and options, and allowing lower organizations a wider margin for creativity and imagination.

6.4 Conceptual and operational diversification in planning and management faced with different realities

The flexibility demanded of educational planning and management in theory and in practice implies a capacity for adapting these to different national realities and contingencies. It also presupposes a capacity to coalesce and harmonize policies, to set suitable priorities, to arbitrate resources fairly in view of social considerations, to evaluate processes and results with serenity, to redefine options, and more.

(36) Sander, Beno: Administración de la Educación en América Latina: El concepto de relevancia cultural. O.E.A., Revista de Educación No. 96, Washington, 1984, p. 62.

6.5 Educational planning and management to reinforce democracy and improve educational quality

In the near future, this will undoubtedly remain a challenge to education and therefore, to educational planning and management, especially in the following regards:

- To actualize equal opportunities for access, continued attendance and follow-up in education for the entire population, beginning with an initial widening of the social foundations and increasing the population in basic education.

- To reduce the trend towards a qualitative segmentation of education, particularly for the most disfavoured groups. Without striving for "utopian egalitarianism", the aim must a homogenization that finds its roots in literacy and basic schooling.

- To raise the quality of scientific and technological contents to take on, assume and fill a leading role in such fields.

- But it is of no less importance to restitute education to its role of helper in the building of societies that are democratic, equitable, peaceful, proud of their cultural heritage, and united: that is to say, to build a new social model.

6.6 Possible orientations, measures and programs in educational planning and management

Given the present context of uncertainty, making recommendations for policy or action is no easy matter, but the following tentative pronouncements may be made :

- To place educational planning and management processes within the perspective they are now being given, as "social manager" for development;

- To support training and research centers that are working on the problems and theories of organization and planning;

- To strengthen regional and particularly sub-regional action for teacher training in these fields, attuned to strategies of Latin American integration in general and sub-regional integration in particular, primarily seeking cumulate impact.

- To develop joint programs in research, training and tutorship geared towards educational decentralization, particularly for those cases where the aim of this decentralization is the base.

- To incorporate theory and methodology of planning into teacher training programs.

- To attribute a more important role to the regionally present IIPE.

- To reinforce the circulation of information concerning experiences, theoretical and practical progress, teaching materials, international currents and more.

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